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ABSTRACT

This report describes in detail the Central Midwest Regional Educational Laboratory's (CEMREL) activities during the October 1976-February 1977 planning phase of the nationwide R & D Exchange (RDX) program sponsored by the National Institute of Education. Basically, CEMREL's task during the planning period was to develop plans for the creation and operation of a regional information exchange involving educational agencies and organizations in the states of Missouri, Kansas, Nebraska, Wisconsin, Minnesota, Iowa, Michigan, Illinois, Ohio, Indiana, Kentucky, and Tennessee. The report documents the planning events and interactions carried out during the planning period and raises issues pertaining to past and future RDX activities. It also includes a compilation of all products and major documents generated by the regional exchange staff during the planning period. Included is a discussion of how the regional exchange adhered to its plans for improving opportunities for women and minorities, as well as an accounting of how the regional exchange distributed NIE catalogs during the planning period. (Author/JG)

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# Final Report on
# Regional Exchange Activities
# During the October 1976-February 1977
# Planning Phase

BEST COPY AVAILABLE

CEMREL, Inc.
3120 59th Street
St. Louis, Missouri 63139

March, 1977

EA 009 689

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## Overview of Planning Activities

The planning of a CEMREL/McREL Regional Exchange (RX) began in October of 1976, through a contract with NIE. CEMREL, with a subcontract to McREL, initiated planning activities with representatives across a twelve-state region, that included the following states: Missouri, Kansas, Nebraska, Wisconsin, Minnesota, Iowa, Michigan, Illinois, Ohio, Indiana, Kentucky and Tennessee. The CEMREL/McREL Regional Exchange has operated as part of the larger R & D Exchange (RDx) made up of four national service contractors and four additional Regional Exchanges.

During the five-month planning period from October through February, the RX staff have engaged in discussions and other planning activities with representatives of a wide range of education agencies within and outside of the twelve participating states. A December 14-15 conference at CEMREL involved the participation of representatives from the HEW Regional Office, eight state education agencies (SEA's), ten local education agencies (LEA's), and thirteen intermediate service agencies (ISA's) or dissemination-oriented agencies (NDN Facilitators, PIP Diffusion Contractors. SEA regional media centers, intermediate school districts, etc.). A similar conference was held in Detroit in January. Further, RX staff visited a number of state departments of education to discuss the plans personally with SEA officials.

Other planning activities included discussions with other RDx contractors, NIE, and a number of other state and national dissemination and information resource agencies (ERIC, RISE, the National Dissemination Leadership Project, and National Diffusion Network).

Throughout the planning a core group of about 30 persons from key education agencies within the region have participated directly. These include one or more representatives of the respective SEA's and at least one representative of another education agency in each state. Altogether face-to-face planning activities included the involvement of the following numbers of people from education agencies (a full list of contacts is included in Section IV below):

| Agency | Number of Persons Involved Directly in RX Planning Sessions |
|---|---|
| HEW Regional Offices | 1 |
| SEA's | 30 |
| ISA's | 17 |
| Higher Education Agencies | 2 |
| Other Dissemination Agencies (NDN Facilitators, Teacher Centers, etc.) | 8 |
| LEA's | 12 |

This planning culminated in a proposal for continued planning and feasibility testing of selected activities of an RX as part of NIE's RDx. The planning and feasibility testing will be done within the same 12-state region noted above minus Kentucky and Tennessee. The continued RX planning and feasibility testing will be guided by the long-term objective of increasing practitioners' access to and use of R & D outcomes, to enhance their capability to select and use R & D outcomes, and to help practitioners have more influence on the direction of R & D. In addition to the overall RDx objectives, the objectives for this nine-month planning and feasibility period will be to: (a) conduct regional planning of and testing approaches to implementing RDx system objectives as they pertain to the RX; (b) design and prepare activities around the core RX functions relating to dissemination and feedrorward.

NIE and RDx members made the decision that the primary recipients of RX services will be state dissemination personnel. Secondary recipients of services will include ISA's and large city LEA's, other dissemination agencies within the region (such as NDN Facilitators), and HEW Regional Office dissemination personnel. Those groups for whom RX services are ultimately intended will be key participants in the planning process during the next 9 months.

Specifically, the March-November phase will consist of a continuation of state and regional planning for the operation of an exchange in the region. Additionally, the RX will initiate, on a limited scale, selected services for feasibility testing. Those services will include:

a. Providing assistance in planning and implementing training for persons in key dissemination and training roles (including a 1-1/2 to 2 day workshop dealing with the utilization of information resources, such as the ERIC system).

b. Disseminating user-oriented information concerning the outcomes of educational research and development, especially in the areas of reading and elementary mathematics.

c. Disseminating a substantive type magazine (tentatively titled R & D Report) to communicate R & D outcomes regularly to the education community (an insert will highlight the RX region).

d. Establishing a small-scale regional collection of R & D resource materials to provide quick and direct access to consumer information materials and selected R & D products.

e. Identifying regional and extra-regional R & D information systems of potential usefulness to state and intermediate linkers, and assisting linkers in accessing those systems.

f. Summarizing educational needs and priorities within the region for the purpose of guiding future R & D efforts.

In addition to the services offered above on a pilot basis, the RX will involve the participating agencies in three types of planning activities. First, the RX staff will develop plans in close cooperation with each state education agency for the long-term operation of a regional exchange. RX staff will make one to three visits to each SEA to plan with the appropriate people during the nine-month period in order to minimize out-of-state travel and participants. Secondly, the RX will provide expenses for one SEA representative to attend a two-day regional planning meeting in St. Louis, probably in August. Finally, the RX will solicit the SEAs' recommendations for how it would like to be represented on a regional advisory board that will be established to oversee the regional activities of the RX.

The remainder of this report documents the planning events and interactions noted above and raises issues pertaining to past and future RDx activities. The report also includes a compilation of all deliverables and other major documents generated by the RX staff during planning period. Included is a discussion of how the RX adhered to its plans for improving opportunities for women and minorities. Also included is an accounting of how the RX distributed NIE catalogs during the contract period.

## Key Issues

A number of issues emerged over the five-month planning period that deserve RDx, RX and NIE attention. For discussion purposes, these issues are catagorized as follows: issues related to cooperative RDx planning; issues related to working in a planning mode vs. an operational mode; and issues and concerns raised by participants in the CEMREL-McREL RX region.

### Issues Related to Cooperative RDx Planning

While the advantages inherent in interdependent, cooperative relationships are many, there are inherent difficulties as well. Coordinated planning has been difficult during this five-month period partially due to the dependence of each RDx contractor on other RDx contractors. Sharing of information and ideas has been hampered by both time and distance. Dur to the heavy workload of each RDx contractor, there were few occasions during which all contractors were in the same location, and were able to address all their common problems.

### Issues Related to Working in a Planning Mode vs. an Operational Mode

During the five-month planning phase, the nature of the RX (and RDx) mission was difficult to communicate to regional participants. As the RX was not offering concrete services or materials, there was some confusion in the region as to just what we were "about." This became frustrating at times for regional participants as well as for RX staff.

### Issues and Concerns Raised by Regional Participants

During the five-month planning period, a variety of education agencies became involved in RX planning. The following issues and recommendations emerged from both group and individual meetings with education agencies in the RX region.

1. RX planning should proceed from a comprehensive data base which reflects the nature and extent of dissemination activities ongoing within the region.

2. The RX should not duplicate services currently provided by education agencies within the region.

3. RX activities should be coordinated with state departments of education, as well as with other education agencies involved in dissemination.

4. Services/information provided by the RX should be matched with the individualized needs of education agencies within the region. This implies the development of alternative delivery modes and systems.

5. RX planners should develop criteria for maintaining quality control for both information and human resources.

6. Emphasis should be on human resources as well as on information and information retrieval systems.

7. The development of a feedforward system should be a priority.

8. Turnaround time from request to the actual delivery of information/service must be relatively short if the RX is to be seen as a useful resource.

## List of Major Events

| Event | RX Involvement |
|---|---|
| . 3 RDx System meetings: | |
| October 18-20, 1976, Washington, D.C. | Dane Manis and Jim Winter |
| November 21-23, 1976, Washington, D.C. | Dane Manis |
| January 11-14, 1977, Washington, D.C. | Dane Manis |
| . RX regional planning conference at CEMREL December 13-14, 1976 | (See Summary Report in Appendix A.) |
| . RX regional planning conference at the Wayne County Intermediate School District (near Detroit, Michigan), January 27-28, 1977 | (See Summary Report in Appendix B.) |
| . RX meeting with Michigan Intermediate School District, RESA's, and SEA staff, November 9-10, 1976 (Detroit, Michigan) | Jim Winter, CEMREL; David Wells, Assistant Superintendent, Oakland Schools; William C. Miller, Deputy Superintendent, Wayne County Intermediate School District; George Grimes, Director, Project VALUE; Urey B. Arnold, Deputy Superintendent, Macomb Intermediate School District; Olga Moir; John Osborne, Coordinator, Dissemination and Utilization; Esther Heusner, Curriculum Coordinator, Livonia Public Schools; William Simmons, Superintendent, Wayne County Intermediate School District; Stuary C. Ronkin, Assistant Superintendent, Detroit Schools; Viola Walker, Project VALUE |
| . RX staff meetings with individual SEA's and ISA: | |
| Individual States' Involvement | |
| Illinois | |
| October 26, 1976, Meeting at SEA | CEMREL--Dane Manis and Jim Winter; Illinois Office of Education--Carol Reisinger, Manager of Capacity Building Project; Bud Grossner--Director of LEA Services; Nelson Ashline--Deputy Superintendent, Division Porgram Services |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report in Deliverables and major documents.)<br>SEA--Carol Reisinger, Manager of Capacity Building Projec<br>PIPs Diffusion--Shirley Menendez, Director; Lucille Cummings, Consultant; Jacksonville Schools--Bob Crowe, Superintendent |
| February 3, 1977 | CEMREL--Dane Manis and Sharon Koenigs<br>SEA--Carol Reisinger, Manager of Capacity Building Projec |
| February 16, 1977 | CEMREL--Dane Manis, Sharon Koenigs, Dick Bingman<br>SEA--Carol Reisinger, Manager of Capacity Building Projec (Illinois)<br>SEA--Glenn White, Director of Missouri SEA's Research Coordinating Unit (Missouri) |
| Mount Vernon Program Services Team, November 16, 1976 | CEMREL--Sharon Koenigs<br>PST--Mont Davis, Assistant Director; Harold Bookout, Educational Consultant |
| Indiana | |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report)<br>University of Indiana--Bud Harty, Associate Director of Teacher Education and Extended Services<br>Greater Clark County Schools--David Weber, Director, Special Services/Secondary Education |

| Event | RX Involvement |
|---|---|
| Iowa | |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>Iowa-Nebraska State Facilitator Project--Glenn Clarkston, Director |
| Kansas | |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>SEA--Bonnie Campbell, Abstractor/Indexer KEDDS/KSDE Project Factilitator Project--Ralph Parish, Director KEDDS/LINK Project |
| October 15, 1976 | State Department of Education at Topeka, Kansas<br>Nancy Flott provided information on SEA activitis for the Baseline Report |
| December 4, 1976 | Kansas State College at Emporia<br>KEDDS Library Abstractors Workshop<br>Nancy Flott, Ralph Parish and Bonnie Campbell from State Department presided. About 20 librarians from Kansas Colleges were present. A brief presentation on Regional Exchange was made. |
| January 10, 1977 | State Department of Education at Topeka, Kansas.<br>Phil Johnson, Maxine Fitzgerald, Bonnie Campbell and Nancy Flott were in attendance to participate in Regional planning activities for the Exchange. |
| Kentucky | |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>Kentucky Education Association--Charles Whaley, Director, Public Relations and Research |
| Michigan | |
| November 9-10 meeting with Michigan Intermediate School Districts in Detroit. | CEMREL--Jim Winter<br>SEA--John Osborne, Director, Dissemination and Utilization<br>ISA--David Wells, Assistant Superintendent, Oakland County Intermediate School District; William C. Miller, Deputy Superintendent, Wayne County Intermediate School District; Urey B. Arnold, Deputy Superintendent, Macomb Intermediate School District; William Simmons, Superintendent, Wayne County Intermediate School District; George Grimes, Director, Project VALUE; Olga Moir, Project VALUE<br>Livonia Public Schools--Esther Huesner, Curriculum Coordinator<br>Detroit Schools--Stuart C. Ronkin, Assistant Superintendent |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>SEA--John Osborne, Coordinator, Dissemination and Utilization<br>Wayne County--George Grimes, Director, Project VALUE<br>Detroit Schools--Theresa Denman, City Supervisor, Elementary Mathematics |
| December 15 RX planning meeting with Michigan at CEMREL | CEMREL--Jim Winter, Dane Manis, Dick Bingman and Sharon Koenigs<br>SEA--John Osborne, Coordinator, Dissemination and Utilization<br>ISA--George Grimes, Director, Project VALUE |

| Event | RX Involvement |
|---|---|
| January 27-28 RX planning meeting in Detroit | CEMREL--(See Summary Report.)<br>SEA--John Osborne, Coordinator, Dissemination and Utilization; Philip Hawkins, Special Assistant for Planning, Office of Planning; Robert Amudsen, Dissemination and Utilization; Linda Avery, Dissemination and Utilization; Marylyn Hartley, Dissemination and Utilization<br>ISA--David Wells, Assistant Superintendent, Oakland County Intermediate School District; William Miller, Deputy Superintendent, Wayne County Intermediate School District; Urey B. Arnold, Deputy Superintendent, Macomb County Intermediate School District; Viola Walker, Project VALUE; George Grimes, Director Project VALUE; Olga Moir, Project VALUE<br>Western Michigan University--Charles Woodliff, Director, Division of Instructional Communication<br>Detroit Schools--Theresa Denman, Math Supervisor, Elementary Mathematics |
| Minnesota | |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>MPS/UM Teacher Center--Fredrick V. Haven, Director<br>Diana Lassman, Director, THE EXCHANGE |
| January 27-28 RX planning meeting in Detroit | CEMREL--(See Summary Report.)<br>SEA--Roy Tally, Coordinator, Capacity Building Project<br>MPS/UM Teacher Center--Diana Lassman, Director, THE EXCHANGE |
| Missouri | |
| November 4 meeting at SEA | CEMREL--Jim Winter and Dane Manis<br>SEA--Glenn White, Director, Research Coordinating Unit |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>USOE VII--Denny Stephens, Libraries and Learning Resources<br>SEA--Glenn White, Director, Research Coordinating Unit; Tom Odneal, Director, Title IV<br>Missouri Facilitator Center--Jolene Schultz Director; Bill Giddings, Assistant Director; Lynda S. Baumgartner, Project Supervisor<br>U. City Public Schools--James A. Hopson, Superintendent<br>St. Louis Public Schools--Lincoln Daniesl, Division of Evaluation, Divisional Assistant; Steven Daeschner, Director of Research and Evaluation<br>Kansas City Public Schools--A. Odell Thurman, Assistant Superintendent<br>Perry County School District--Larry A. Ackley, Assistant Superintendent |
| February 16 meeting with Missouri SEA at CEMREL | CEMREL--Jim Winter, Dane Manis, Dick Bingman and Sharon Koenigs<br>SEA--Glenn White, Director, Research Coordinating Unit |
| Nebraska | |
| October 14, 1976 | State Department of Education at Lincoln.<br>Dr. Harold Koch and Joan Orander provided data for Baseline Report |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report)<br>SEA--Dale Kennedy, Research Consultant<br>Facilitator Project--Glenn Clarkston, Director<br>Omaha Schools--Irving Young, Coordinator of Research |

| Event | RX Involvement |
|---|---|
| Ohio | |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>Shaker Heights Schools--Mark Freeman, Director, State and Federal Relations |
| Tennessee | |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>SEA--Jere Farley, Chief, Adult Community Education and Auxiliary Service; Tom Hunton, Director, State Education Media Center |
| February 10 meeting at SEA | CEMREL--Sharon Koenigs<br>SEA--Jere Farley, Chief, Adult Community Education and Auxiliary Service |
| Wisconsin | |
| December 13-14 RX planning meeting at CEMREL | CEMREL--(See Summary Report.)<br>SEA--Roy Tally, Supervisor, Information Retrieval Center |
| January 27-28 RX planning meeting in Detroit | CEMREL--(See Summary Report.)<br>SEA--Paul Jacoubeck, Research Assistant<br>Green Bay School District, Director of Research and Development |

## List of Agencies and Key Persons
## Involved in Regional Exchange Planning

### Contacts with SEA Contact Persons

CEMREL contacted all State School Officers representing state departments of education at least one time during the five-month period. The contacts by states in alphabetical order are as follows:

### HEW Regional Office Contact Persons

The Regional Exchange planning involved the participation of states within Regional Office regions IV, V and VII. The contact persons designated by the respective regional commissioners follow:

Region IV--Polly McIntosh, Deputy Regional Commissioner*

Region V--H. Robert Hewlett, Assistant Regional Commissioner, Planning and Special Programs

Region VII--Denny Stephens, Library Services Program Officer

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*Now Kenneth A. Brunner, Acting Assistant Regional Commissioner

| State | Chief State School Officer | Designated Contact Person |
|---|---|---|
| Illinois | Joseph M. Cronin<br>State Superintendent | Carol Reisinger<br>Manager of Illinois Resource and Dissemination Network |
| Indiana | Harold H. Negley<br>State Superintendent | Barbara Pashos<br>Associate Superintendent |
| Iowa | Robert D. Benton<br>State Superintendent | James Mitchell<br>Deputy Superintendent |
| Kansas | Merle R. Bolton<br>Commissioner | Nancy Flott<br>Director<br>KEDDS Resource System |
| Kentucky | James B. Graham<br>Commissioner | Donald S. Van Fleet<br>Head<br>Office of Special Programs and Services |
| Michigan | John W. Porter<br>Superintendent of Public Instruction | Philip Hawkins<br>Special Assistant for Planning<br>Office of Planning |
| | | John Osborne<br>Coordinator<br>Dissemination and Utilization |
| Minnesota | Howard B. Casmey<br>Commissioner | Roy Tally<br>Coordinator<br>Dissemination Capacity Building Project |
| | | Gregory J. Waddick<br>Assistant Commissioner |
| Missouri | Arthur Mallory<br>Commissioner | Glenn White<br>Director<br>Research Coordinating Unit |
| Nebraska | Anne Campbell<br>Commissioner | Harold H. Koch<br>Deputy Commissioner |
| Ohio | Franklin Walter<br>Superintendent | Roger Lulow<br>Director<br>Planning and Evaluation |
| Tennessee | Sam H. Ingram<br>Commissioner | Jere Farley<br>Chief<br>Adult Community Education and Auxiliary Service |

| State | Chief State School Officer | Designated Contact Person |
|---|---|---|
| Wisconsin | Barbara Thompson<br>State Superintendent | Archie A. Buchmiller<br>Assistant Superintendent |
| | | Donald E. Russell<br>Director Information Syste |

Descriptions of the organizational structure of each state department, current dissemination activities, prioritized and working relationships with other agencies were collected and written. The written descriptions were sent back to the state department personnel for revision and updating. These revised descriptions are found in the Preliminary Data Collection Report.

## Contacts with Intermediate Service Agency Persons

Contacts were made with intermediate agencies. They are listed by states as follows:

| State | Contact Person | Agency |
|---|---|---|
| Illinois | Shirley Menendez<br>Director | PIPs Diffusion<br>Metropolis, Illinois |
| Kansas | Ralph Parish<br>Director | KEDDS/LINK<br>Wichita, Kansas |
| Kentucky | Charles Whaley<br>Director<br>Public Relations and Research | Kentucky Education<br>Association |
| Michigan | George Grimes<br>Director | Project VALUE<br>Wayne, Michigan |
| Minnesota | Diane Lassman<br>Director | THE EXCHANGE<br>MPS/UM Teacher Center<br>Minneapolis, Minnesota |

## Contacts with Local Education Agencies (LEA's)

Contacts were made with the following LEA's by states. Extended discussions either telephone or face-to-face were held with some but not all of the LEA's. These are indicated below by astericks. Those discussions formed the basis of the LEA discriptions included in the Baseline Data Report.

| State | School District | Contact Person |
|---|---|---|
| Illinois | Quincy* | Donald Price<br>Director of Curriculum |
| | Chicago* | Lorraine M. Sullivan<br>Assistant Superintendent |
| | Jacksonville | Robert L. Crowe<br>Superintendent |
| | Mascoutah | Don Schmitt<br>Director of Instruction |
| | Sterling | Robert Boggs<br>Superintendent |
| | Freeport | Robert Ashby<br>Superintendent |
| Indiana | Veedersburg* | Harold Huff<br>Superintendent |
| | Logansport* | Ted Hughes<br>Superintendent |
| | Bloomington | Ronald E. Walton<br>Superintendent |
| | Jeffersonville | Boyd Carter<br>Superintendent |
| | Evansville | Victor L. Fischer, Jr.<br>Superintendent |
| | Gary | Gordon McAndrew<br>Superintendent |

| State | School District | Contact Person |
|---|---|---|
| Iowa | Ames | Luther Kiser<br>Assistant Superintendent |
| | Cedar Rapids | Dick Schultz |
| | | C. H. Currie<br>Superintendent |
| | Marshalltown | R. A. McFarland<br>Superintendent |
| | Mount Vernon | Winston C. Addis<br>Superintendent |
| Kansas | Hiawatha | Melvin L. Crouch<br>Superintendent |
| | Wichita | Lawrence A. Bechtold |
| | Manhattan | James M. Benjamin<br>Superintendent |
| | Shawnee Mission* | Norman Babcock<br>Assistant Superintendent |
| | Caney* | John Picard<br>Superintendent |
| | Topeka* | Owen Henson<br>Superintendent |
| Kentucky | Owensboro* | James Hilliard<br>Superintendent |
| | Louisville* | Newman Walker<br>Superintendent |
| | Elizabethtown* | William Sadler<br>Superintendent |
| Michigan | Battle Creek | Jack K. Mawdsley<br>Superintendent |
| | Pontiac | David Wells<br>Assistant Superintendent |
| | Grand Rapids | William Reaves<br>Director of Curriculum Planning |

| State | School District | Contact Person |
|---|---|---|
| | Mt. Clemens | Robert G. Lutz<br>Superintendent |
| | Detroit* | Arthur Jefferson |
| | Wayne | William C. Miller<br>Deputy Superintendent |
| | Oak Park* | Sam Sniderman<br>Superintendent |
| | Clarkston* | Milford Mason<br>Superintendent |
| Minnesota | St. Paul* | Marjorie Niehart<br>Director of Curriculum |
| Missouri | Aurora R-8 | Wayne Barnes<br>Principal |
| | St. Louis* | Robert Wentz<br>Superintendent |
| | Kansas City* | Odell Thurman<br>Assistant Superintendent |
| | University City* | James Hopson<br>Superintendent |
| | Perryville | Larry Ackley<br>Assistant Superintendent |
| | Springfield | J. E. Kuklenski<br>Superintendent |
| | Rolla | John E. Roam<br>Superintendent |
| | Columbia | Russell V. Thompson<br>Superintendent |
| | Kirksville | William Matthew<br>Superintendent |
| | Jefferson City | Joe Nichols, Jr.<br>Superintendent |
| | Joplin | Jack Allman<br>Superintendent |

| State | School District | Contact Person |
|---|---|---|
| | Eminence* | S. W. Ennis<br>Superintendent |
| | Lees Summitt* | Bernard Campbell<br>Superintendent |
| | St. Joseph | Gerald Troesker<br>Superintendent |
| Nebraska | Norfolk | Glenn Shaneyfelt<br>Director<br>of Elementary Education |
| | Lincoln* | John Prasch<br>Superintendent |
| | Kearney | W. F. Urbanek<br>Superintendent |
| | North Platte | Jack G. Elliott<br>Superintendent |
| | Omaha | Irving C. Young<br>Coordinator of Research |
| | Valentine | James F. Waltz<br>Superintendent |
| | Broken Bow | Roger H. Hanson<br>Superintendent |
| | Chadron | Elmer W. Corbit<br>Superintendent |
| | Belleview* | Richard Triplett<br>Superintendent |
| Ohio | Cleveland | Peter Carlin<br>Supervisor of Instruction |
| | Shaker Heights | Mark Freeman<br>Director<br>State and Federal Relations |
| Tennessee | Memphis* | John P. Freeman<br>Superintendent |
| | Nashville* | Edward Binkley<br>Director of Research |
| | Oak Ridge | Robert Smallridge<br>Assistant Superintendent |

| State | School District | Contact Person |
|---|---|---|
| Wisconsin | Eau Claire | Marvin Lansing<br>Superintendent |
| | Sun Prarie | Glenn Davison<br>Associate District Administra |
| | Green Bay* | Donald Scott<br>Director of Curriculum |
| | Black River Falls | Gavin M. Strand<br>Superintendent |

## Adherence to Plans for Improving Opportunities for Women and Minorities

Participation in RX planning conferences included the following:

| | | | |
|---|---|---|---|
| Women | 14 | -- | 28% |
| Men | 36 | -- | 72% |
| Total | 50 | | |
| Minorities | 4 | -- | 8% |

Key SEA contact persons for the RX included the following:

| | | | |
|---|---|---|---|
| Women | 3 | -- | 25% |
| Men | 9 | -- | 75% |
| Total | 12 | | |
| Minorities | 1 | -- | 8% |

An analysis of names listed on the organizational charts of 4 SEA's in the RX region yielded approximately 17% women, in comparison to the 25-28% participation of women in RX planning activities.

## NIE Catalog Distribution

CEMREL-McREL Regional Exchange staff distributed 94 sets of the Catalog of NIE Education Products from December 6, 1976 through March 25, 1977. Names and addresses of individuals receiving the catalog follow.

## NIE Catalog Distribution

| Name | Title and Address | Date | Quantity |
|---|---|---|---|
| Paul Owoc | Evaluation Specialist<br>Consumer Information Contract<br>CEMREL, Inc.<br>3120 59th Street<br>St. Louis, MO 63139 | 12/6/76 | 1 set |
| Ron Stodghill | Associate Superintendent<br>Instructional Support Service<br>St. Louis Public Schools<br>1517 South Theresa<br>St. Louis, MO 63134 | 12/8/76 | 1 set |
| Ralph Parish | Director<br>KEDDS/LINK<br>670 N. Edgemoor<br>Wichita, KS 67208 | 12/15/76<br>(RX Conference) | 1 set |
| Larry Ackley | Assistant Superintendent<br>Perry County School District #22<br>Box 327<br>Perryville, MO 63775 | 12/15/76<br>(RX Conference) | 1 set |
| Tom Odneal | Director<br>Title IV<br>State Department of Education<br>Box 480<br>Jefferson City, MO 65101 | 12/15/76<br>(RX Conference) | 1 set |
| Diane Lassman | Director<br>THE EXCHANGE<br>MPS/UM Teacher Center<br>166 Peik Hall<br>Minneapolis, MN 55455 | 12/15/76<br>(RX Conference) | 1 set |

NIE Catalog Distribution

| Name | Title and Address | Date | Quantity |
|---|---|---|---|
| Lincoln Daniels | Divisional Assistant<br>St. Louis Public Schools<br>Division of Evaluation<br>St. Louis, MO 63104 | 12/15/76 | 1 set |
| Irving Young | Coordinator of Research<br>Omaha Public Schools<br>4469 Farnam<br>Omaha, NE 68131 | 12/15/76 | 1 set |
| Shirley Menendez | Director<br>PIPS-Diffusion Service Center<br>500 Market Street<br>Metropolis, IL 62960 | 12/15/76 | 1 set |
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|  |  |  |  |

## Deliverables

The following deliverables and planning documents are appendid to this report:

1. Status Report on the Involvement of HEW Regional Offices and State Education Agencies in Exchange Planning (Appendix A)
2. Preliminary Data Collection Report, October 1, 1976 - February 28, 1977 (Appendix B)
3. Summary Report: Regional Exchange Planning Conference, St. Louis, Missouri, December 14-15, 1976 (Appendix C)
4. Summary Report: Regional Exchange Planning Conference, Detroit, Michigan, January 27-28, 1977 (Appendix D)
5. Sentence Outline for Operational Plan (Appendix E)

# Appendix A

# Status Report on the Involvement of HEW Regional Offices and State Education Agencies in Exchange Planning

# Status Report on the Involvement of
# HEW Regional Offices and State Education
# Agencies in Exchange Planning
October 14, 1976

## HEW Regional Offices

Each HEW Regional Office - in Regions V, VII, and IV - of the proposed CEMREL-McREL Exchange region has been invited to participate in exchange planning activities. In response to the invitation and explanation of proposed System activities, given through phone conversations and correspondence by Dr. Jim Winter, each Regional Commissioner has enthusiastically agreed to participate in such planning activities. The confirmation and support letters are attached.

Regional Commissioners in Regions V and VII have formally designated staff members in their respective offices to serve as contact persons and to work with the CEMREL-McREL Exchange staff during Phase I.

Following the first System meeting, October 18-20, Dr. Winter and Dane Manis will involve each Regional office in preparing for and participating in a major Exchange Planning Conference, tentatively scheduled for December.

## State Education Agencies

Involvement of the SEA's in the twelve-state CEMREL-McREL Exchange region has proceeded in the manner projected in the Exchange proposal. Initial contact with SEA's was made by CEMREL and McREL staff during the preparation of the Phase I proposal. In that communication the purposes and possibilities of the Dissemination and Feedforward System, including in particular the Regional Information Exchanges, were explained to the respective Chief State School Officers by way of telephone conversations, correspondence, and reading of pertinent sections of the D & FS RFP.

Each state in HEW Regions V and VII plus Kentucky and Tennessee was invited to participate in planning with CEMREL and McREL during Phase I, for a Regional Information Exchange. Each state responded with a letter affirming support of the planning effort and stating a positive interest in participating in such planning. The following list details the source of the respective support letters:

| | |
|---|---|
| Iowa | Robert D. Benton<br>State Superintendent of Public Instruction |
| Nebraska | Anne Campbell<br>Commissioner of Education |
| Kansas | Merle R. Bolton<br>Commissioner of Education |
| Missouri | Arthur L. Mallory<br>Commissioner of Education |
| Indiana | Harold H. Negley<br>State Superintendent |
| Minnesota | Gregory J. Waddick<br>Assistant Commissioner |
| Wisconsin | Barbara Thompson<br>State Superintendent |
| Michigan | John W. Porter<br>Superintendent of Public Instruction |
| Ohio | Martin W. Essex<br>Superintendent of Public Instruction |
| Illinois | Joseph M Cronin<br>State Superintendent |
| Tennessee | Sam Ingram<br>Commissioner |
| Kentucky | James B. Graham<br>Superintendent of Public Instruction |

Following notification of the award of the Regional Information Exchange grant for Phase I activities, the CEMREL-McREL Exchange staff sent announcement letters to each of the SEA officers listed. The letter announced the grant award and previewed Phase I Exchange activities in which the SEA's would be involved. Additionally the letter requested that a special contact person be designated to work closely with the Exchange staff and other participants in Phase I activities.

That letter will be followed-up by a telephone call from Exchange staff next week, following the first System meeting. The purpose of the follow-up will be to initiate baseline data collection, to orient the contact person to the goals and activities of the Exchange and the D & DS, and to seek the contact person's advice and support in selecting sample LEA's and ISA's in the state. In some instances the telephone contact may be augmented or replaced by a direct visit to the SEA. Another important matter to be addressed in the initial "working" session with SEA contact persons is commencing discussions about the Planning Conference and the SEA's role in the Exchange planning.

It is difficult to know, at this early stage in the project, the full extent of each SEA's interest in D & FS in general in the Regional Information Exchange in particular. The depth of the SEA's commitment will surface as the D & FS takes shape during the coming months and years. During that period the SEA's, and other participating agencies, will be forming judgments about the relative costs and benefits of participating in the System's services as offered through the Information Exchange. With the above qualification in mind, we are nevertheless pleased with the SEA's response and show of interest in the prospect of Regional Information Exchanges and the larger D & FS. We are quite optimistic about the level of support and envolvement we foresee for the SEA's in our region.

We are at the same time aware of the difficulty of knowing, at this early stage, the full extent of the hopes, fears, images, and expectations the SEA's, and other participants, hold for the D & FS, or to know the extent of divergence and conflict inherent in the views held by individuals and the various participating agencies. Such knowledge is likely to be of critical importance in planning and implementing an inter-agency structure such as the D & FS.

CEMREL/McREL

REGIONAL EXCHANGE

# PRELIMINARY DATA COLLECTION REPORT

# DISSEMINATION AND FEEDFORWARD SYSTEM

February, 1977

## Appendix B

CEMREL, Inc.
3120 59th Street
St. Louis, Missouri 63139

Prepared by CEMREL, Inc., a private nonprofit corporation supported in part as an educational laboratory by funds from the National Institute of Education, Department of Health, Education, and Welfare. The opinions expressed in this publication do not necessarily reflect the position or policy of the National Institute of Education, and no official endorsement should be inferred.

# INTRODUCTION

## Purpose

The central purpose of this report is to highlight information and problematic issues that bear on the formation and future operation of the NIE R & D Exchange (RDX) (formerly, the Dissemination and Feedforward System) in general and of the CEMREL/McREL Regional Exchange in particular.* Thus, the persons and agencies involved in planning the RDX are the principle audiences to whom the report is addressed. Since the CEMREL/McREL Regional Exchange (RX) planners include representatives of a variety of education agencies at regional, state, intermediate, and local levels, they are also a primary audience for the report.

If the report and the analytical efforts upon which it rests meet this central purpose they should provide clear and accurate information about how dissemination and feedforward functions are presently provided for within the selected region and about programmatic gaps that may exist. Also, in a general way the report should provide the kind of contextual information that can contribute to our overall understanding of populations with whom the agencies and RX will work. In that sense, the report represents an initial attempt on the part of the RX staff to survey dissemination practices within the region so that RX plans can be made in the light of knowledge rather than ignorance of what already exists.

The report also provides information that bears directly on the work of other RDX contractors, such as the R & D Interpretation Service. Finally, the report and the data collection and analyses upon which it rests represent an important first step toward developing practical and useful RDX data collection and reporting procedures.

---

*The following states participated during the initial five-month planning phase during which this report was prepared: Missouri, Kansas, Nebraska, Iowa, Michigan, Minnesota, Wisconsin, Ohio, Illinois, Indiana, Kentucky and Tennessee.

## Key Questions

The following general questions provided the initial focii for the data collection:

- What are the major dissemination activities that exist at OE Regional Offices, SEA's, ISA's and LEA's (compare and contrast)? What is being disseminated? By whom? To whom? For what purpose?
- What are the strengths and weaknesses of the respective activities as perceived by the actors?
- What are the major consumer issues, problems, concerns expressed?
- What are the initial attitudes expressed concerning the possible operation of an R & D Information Exchange?
- In general terms, what is the current use of and reactions to R & D outcomes?

Those general questions provided some degree of uniformity in the descriptions and commentary across the various agencies discussed in the report, though departures from the questions were not uncommon in our discussions with education agency personnel.

## Data Collection

### Sources of Information

In large part, this report deals with dissemination policies and practices of agencies i.e., HEW Regional Offices, State Education Agencies (SEA's), and intermediate agencies oriented toward dissemination. Most of the information about such policies and practices of the various education agencies was obtained from persons who are employed by the respective agencies or who work directly with the agencies in some way. For example, in one SEA our primary source of information about that particular agency was a deputy superintendent who had been designated by the SEA's chief school officer to serve as a contact and liaison person in the RX planning effort. The "contact" person then served as the primary source of information about the agency by answering the questions we posed, supplying us with pertinent support documents, and in many cases, directing us to other persons to query within the agency.

Each agency description below includes a brief indication of the agency role and of the person(s) who served as information sources. RX staff had asked the agency to designate as contact persons only someone who was knowledgeable, interested, and active in the agency's dissemination activities in some way. Our experience in the data collection indicates that such contact persons were designated in every case, though the formal authority of the contact persons varied from agency to agency.

Telephone interview techniques and, in about half the cases, face-to-face interview techniques were used to obtain and elaborate most of the information embodied in the report. That information was supplemented by information gleaned from a variety of documentary sources such as State Education Directories, Patterson's American Education (1976), grant proposals, agency newsletters, agency policy and statements, and evaluation reports.

## Data Collection Reporting

The information was guided by the central purpose and questions noted above, but it also was guided by specific sets of questions related to each agency. Those sets of questions then served as a loose guide for the discussions in the use of documentary sources. The questions were refined and reordered as the data collection proceeded, as the RX staff sought to formulate questions that seemed most pertinent to RX and RDX planning.

The interviews, whether by telephone or face-to-face, were informal and flexible in allowing the RX staff person or the contact person to focus on those questions and topics that seemed most pertinent to the agency and to RX planning, although all major questions included in the reporting formats below were addressed in the data collection for each agency.

## Validity, Accuracy and Credibility of the Information

The quality of the information will ultimately be judged according to its usefulness in RDX and RX planning. The questions we addressed in the data collection and reporting represent our best guess, refined during our discussion with the various education agency personnel, concerning what kinds of information would be pertinent to RDX and RX planning.

We have confidence in the planning value of the information collected. That confidence is based on the belief that our "contact" persons in each of the selected agencies were in a position to speak knowledgeably about their agency's dissemination, dissemination training, and feedforward activities and policies. Further, we found the contact persons seemed willing to speak candidly about their agency's dissemination activities and policies. The contact persons appeared to willingly give time for the data collection activities and seemed generally positive toward their agency's potential involvement in RX planning and operation. In many cases more than one person within an agency was questioned, so that as many perspectives as possible could be reflected in the information within the time constraints of the reporting schedule.

One implication for data collection emerged early in our discussions with SEA's. We discovered that each SEA has a formal structure for reviewing proposals for LEA data collection. This structure, the Committee on Evaluation and Information Systems (CEIS), was recently established by the Council of Chief State Schools. Though we are not certain about how uniform the CEIS activities are in all SEA's, it appears that CEIS could either facilitate or constrain future data collection efforts depending on how important CEIS representatives consider the particular data collection activities to be. Each SEA has a person designated as CEIS coordinator for its data collection review process.

## Overview of Findings

It is difficult to reduce a report like this one to a brief list of "findings" without oversimplifying the realities and the complexities of the data to some extent, especially at this early stage of inquiry. Nevertheless, we have tried to extract a few of the dominant impressions we came away with from this early survey. It is important to consider the findings as only the beginning of an attempt to understand dissemination and feedforward processes within and among the education agencies. Those initial impressions follow:

(a) SEA's vary considerably in their approaches to dissemination in their use of Intermediate Service Agencies and in their policies toward validating and/or endorsing educational programs/projects.

(b) Despite the variety in dissemination approaches and policies among SEA's, in most SEA's, a significant amount of dissemination is done within the separate program divisions within the SEA's.

(c) Dissemination is increasingly recognized as important, judging by the extent of planning and reorganization being done. Ten of the twelve states surveyed are undertaking new dissemination planning and programs under NIE dissemination grants, either Special Purpose or Capacity Building grants.

(d) A substantial number of dissemination-type agencies and communication networks, formal and informal, exist within and among the states in addition to the state and intermediate education agencies in the RX planning region. These included the National Diffusion Network, State Facilitator projects and Developer/Demonstrator projects (sponsored by the Office of Education), the ERIC clearinghouses and Information Retrieval Centers, PIP Diffusion contractors, and a variety of teacher centers. Two notable examples of cooperation among states are the National Dissemination Leadership Project (sponsored by NIE) and the Midwest Interstate Dissemination Consortium (made up of SEA's from Illinois, Indiana, Michigan, Minnesota, Missouri, Ohio, and Wisconsin). Both projects focus on SEA's.

(e) "Educational R & D," either as products or as a development process, does not seem to be prominent in the agencies examined, unless one considers the NDN activities and list of validated products or SEA validation of local projects to be "R & D."

(f) RX staff received a friendly, though occassionally skeptical, response from all agencies in the data collection discussions. Contact persons willingly gave their time for extended telephone discussions and visitations in most instances. Persons indicated they felt the discussions were useful to them in rethinking some of their agencys' activities and policies and that the problem of dissemination was an important one.

(g) The initial data collection and analysis activites embodied in this report have really only scratched the surface in documenting dissemination and feedforward functions within and among the agencies.

## How the Report Is Organized

Chapter 2 is organized around the following kinds of agencies described: (a) HEW Regional Offices; (b) State Education Agencies (including Intermediate Service Agencies); (c) Local Education Agencies; and (d) Other education agencies that provide dissemination services. A general overview of findings and key issues precedes each set of agency descriptions.

# PRESENTATION OF DATA

## HEW Regional Offices: Overview and Issues*

Presently HEW Regional Offices serve a dissemination function primarily in transmitting federal regulatory and fiscal information to education agencies within their regions. Until recently, the dissemination responsibilities of the Regional Offices lacked specificity, especially with respect to the dissemination of R & D outcomes. In 1975 and 1976, the dissemination responsibility was assigned more specifically to the Office of the Regional Commissioner and the Office of Planning and Special Programs, according to a policy statement in the Federal Register on August 27, 1976. Specifically, the Federal Register describes the responsibilities as follows:

> Office of the Regional Commissioner. Serves as a center for dissemination of information and provides technical assistance to the State and local education agencies, institutions of higher education, and other educational agencies, institutions, and organizations, and to individuals and other groups having an interest in federal education activities.
>
> Office of Planning and Special Programs. Provides technical assistance and dissemination services for legislated programs as directed by the Regional Commissioner. Develops and monitors Regional Office objectives established through the Operational Planning System and coordinates objectives interfacing with the regional HEW and headquarters system of objectives. Serves as the intro HEW and interagency coordinating division of the Regional Commissioner. Prepares special studies relative to the unique educational needs of the region as a basis for effective program administration and as a basis for policy recommendation at the national level. Serves as regional contact for program functions and activities assigned to the Immediate Office of the Commissioner, Office of Indian Education, and Bureau of Education for the Handicapped, by providing technical assistance and dissemination functions as directed by the Regional Commissioner. Provides the Regional Commissioner with input and recommendations for all aspects of forward planning such as program budget formulation, evaluation planning, and legislative planning. Monitors and evaluates the use of Office of Education program resources in the field and provides recommendations to enhance and improve the administration, utilization and effectiveness of program and project activities.
>
> Federal Register, Vol. 41, No. 168
> Friday, August 27, 1976.

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*The CEMREL/McREL Regional Exchange planning region includes states in all of HEW Regions VII and V and part of Region IV.

Generally, dissemination activities at the Regional Office are decentralized, taking place within each major division and largely independent of other programs' dissemination activities.

SEA's are the prime recipients of Regional Office dissemination activities. Contact with LEA's is far less frequent, dealing with such matters as school desegregation. Colleges and universities, state libraries, and bankers and lenders (for Guaranteed Student loans) are also major recipients of information disseminated through the Regional Offices. The Regional Office also supplies information to other education agencies such as Bilingual Education Service Centers.

The USOE is the major originator of the information distributed through the Regional Offices. NIE is a relatively minor originator or contributor of information to the Regional Offices. As a matter of policy, the Regional Office cannot print materials directly for dissemination. Instead, the Office receives its materials from the U.S. Office of Education, and from NIE to a much lesser extent. The Regional Office conceives of its role as an arm of the office in Washington, D.C., as a "pipeline" from the U.S. Office of Education to the various target groups in a region. The "pipeline" does not always work smoothly. For example, in some instances, the Regional Office receives materials to distribute from USOE in Washington, D.C., with inadequate explanations of what to do with the materials.

The Regional Office's role in disseminating NIE information is limited due to lack of resources and staff assigned within the Regional Office (one professional staff person and one secretary who have many other responsponsibilities) and due, in part, to the quality of the information received from NIE. The work is done as a courtesy to NIE, to help disseminate NIE information to SEA's, but it is not well-organized or adequately staffed presently, due to limited resources. Overall, the role of educational R & D does not appear to be prominent within the dissemination activities and policies of the Regional Offices.

While the present role of R & D outcomes and NIE in particular, are relatively minor within the Regional Offices dissemination structure, Regional Offices are increasingly concerned with dissemination. Regional Office staff with whom we talked were enthusiastic about becoming involved in RX planning and about the possibility of working closely with other regional and national agencies concerned about improving the dissemination of information useful to educators and education agencies.

# DESCRIPTION OF INDIVIDUAL HEW REGIONAL OFFICES

## Region V

RX Contact Person

Assistant Regional Commissioner, Planning and Special Programs (see organization chart, Figure 1) is our contact.

At this time of the data collection the contact person was also serving as acting commissioner while the commissioner was on special assignment outside of the Regional Office. Our contact person also serves as a liaison or contact person. In that capacity he is the person within the Regional Office who normally receives materials and other communication from NIE.

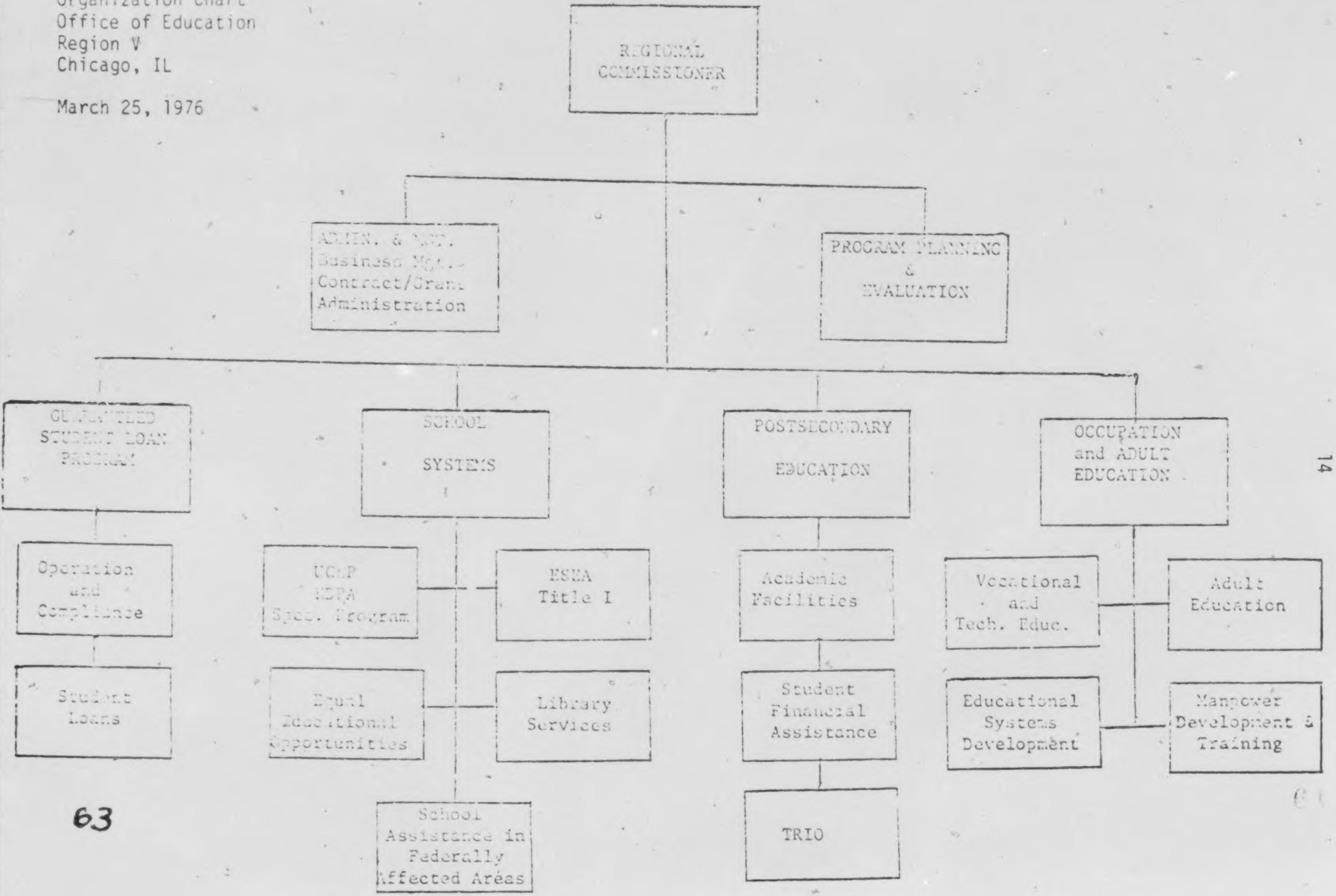
### Dissemination Policies and Practices

The Regional Office disseminates information through its four major divisions and various programs that comprise them: (a) guaranteed student loans; (b) school systems; (c) postsecondary education; and (d) occupational and adult education. Each program--such as ESEA Title I, Vocational and Technical Education, Adult Education, etc.--carries out its own dissemination activities, more or less independent of other programs' dissemination activities.

Most dissemination efforts are directed toward SEA's, directly through the various chief state school officers, concerning such program areas as Career Education and Title I. A lesser amount of contact is made with LEA's in a compliance role concerning Title programs. Also, there is a considerable amount of dissemination to colleges and universities concerning postsecondary programs.

Figure 1
Organization Chart
Office of Education
Region V
Chicago, IL

March 25, 1976


REGIONAL COMMISSIONER
ADMIN. & MGT.
Business Mgt.
Contract/Grant Administration
PROGRAM PLANNING & EVALUATION
GUARANTEED STUDENT LOAN PROGRAM
SCHOOL SYSTEMS
POSTSECONDARY EDUCATION
OCCUPATION and ADULT EDUCATION
Operation and Compliance
Student Loans
UC&P
EDPA
Spec. Program
ESEA Title I
Equal Educational Opportunities
Library Services
School Assistance in Federally Affected Areas
Academic Facilities
Student Financial Assistance
TRIO
Vocational and Tech. Educ.
Adult Education
Educational Systems Development
Manpower Development & Training

## Region VII

### RX Contact Person

The Library Services Program Officer has been designated by the Regional Commissioner as our contact person.

The RX contact person also serves as the NIE liaison within the Regional Office. In his role as Library Services Program Officer, the contact person is in an advantageous position for speaking knowledgeably about the Regional Office's role in dissemination, and in particular, in responding to information requests.

### Dissemination Policies and Practices

The audiences for information include SEA's, State Libraries, Colleges and Universities, bankers and lenders (concerning Guaranteed Student loans), and LEA's (though the relationship to LEA's is on an individual rather than group basis). Additionally, the Office also feels the responsibility to disseminate information to "other groups having an interest in education," including general public and professional associations. SEA's are the major target of the dissemination activities. The Regional Exchange presently responds to a variety of information requests from teachers, school administrators, and others concerning such matters of educational policy, legislation, statistical data, and government documents. The requests are handled through the appropriate program staff or through Library Services.

The Regional Office defers most dissemination responsibility to the separate divisions and related programs, each operating more or less independent of the others' dissemination efforts. Presently, each division issues its own information, usually in memorandum form, to the various audiences. The Office hopes to initiate a regular office-wide newsletter, but it is not operational presently.

Information about "R & D outcomes" is minimal at the present time. The liaison with NIE is provided as a courtesy to NIE to help NIE staff locate appropriate persons within the Office. Yet, overall there has not been much contact with NIE.

## Region IV

### RX Contact Person

The Associate Regional Commissioner for Planning has been designated as our contact person. An individual in her office has also been identified as a liaison when needed.

### Dissemination Policies and Practices

Region IV operates basically as the two regions previously described. It has the same four major divisions and each division has responsibility for dissemination within its areas of activity throughout the region.

Due to some closer relationships in the past (CEMREL administered the education component of Model Cities in Nashville, Tennessee, for three years), CEMREL currently is working in cooperation with the Associate Commissioner for Post Secondary in introducing, training, and implementing CEMREL-developed R & D products into 84 Upward Bound Projects throughout the entire eight state region.

## Similarities Among SEA's

A number of similarities among SEA's emerged from our discussions with SEA officials and our other examinations of SEA activities, policies, and concerns related to dissemination and feedforward functions. Each SEA in the CEMREL/McREL Exchange planning region was engaged in some form of planning related to dissemination policies and practices. All but two of the states have had NIE dissemination grants for planning or for actually building dissemination capacity. Some SEA's were undertaking a major reorganization of their dissemination activities and had made substantial progress toward reorganization. Others were in the early stages of self-study and planning. Yet, for all SEA's, dissemination was an item of concern and the focus of considerable planning effort. For example, one SEA is in the process of reorganizing all of its dissemination activities and coordinating them under central leadership within the SEA. At the same time the SEA is initiating a major reorganization of the way it serves LEA's through five newly formed regional service teams located throughout the state.

Also common among the states was the existance of one or more NDN State Facilitators, some located within the SEA's. In all cases the presence of the State Facilitators was well known at the SEA level and in most cases the SEA's had histories of working closely with the State Facilitators.

All SEA's are represented by a designated "dissemination representative" in the National Dissemination Leadership Project (NDLP) funded by NIE and directed through the Council of Chief State School Officers. Five of the RX's contacts in SEA's are also the "dissemination representatives" to the NDLP.

Dissemination activities in all SEA's in the RX region are decentralized to a greater or lesser degree, though at least one SEA is presently reorganizing its dissemination activities to bring about a high degree of central coordination and planning. In other SEA's virtually all dissemination is conducted independently in the separate divisions and programs and in a variety of ways. Thus, the activities and policies are difficult to describe and understand fully without considering each state separately.

Though there were differences among SEA's in particular dissemination strategies, for example in the use of educational TV to announce RFP's in one state, the SEA newsletter stands out in all SEA's as a standard dissemination mechanism. The newsletter remains a standby in dissemination. Without judging its relative effectiveness, it is fair to say that the newsletter is considered a basic tool in delivering information to education agencies. LEA superintendents, school principals, and teachers are among the most common audiences for such newsletters.

There is little evidence of regular information exchange or collaboration work between SEA's, except for the interchanges that occur in the National Dissemination Leadership Project, and the Midwestern Interstate Dissemination Consortium, and within special projects. It is also noteworthy that SEA personnel claimed little contact or communication with their HEW Regional Offices, even though our discussion with Regional Office officials indicated that SEA's were a prime target of Regional Office communication.

A final commonality among the SEA officials with whom we spoke was an expression of interest in the RDX and NIE sponsorship of dissemination activities. The reactions included elements of optimism, skepticism and, in one case, hostility toward the possibility of NIE providing long-term support for an R & D oriented dissemination anf feedforward system.

## Differences Among SEA's

A number of differences emerged in the organization and activities of SEA's and the CEMREL/McREL Exchange planning region. Most notable were the differences in intermediate service agencies. Ten of the SEA's have, or are in the process of establishing some kind of ISA's that permit regionalized service to LEA's. Not all of the ten states noted have ISA's that provide full coverage of the state. The organizational structure and service activities of the ISA's vary substantially among the states. Also, the relationship with SEA's differ. Some ISA's are much more independent of their SEA's than are other ISA's. One state has no ISA except as a regulatory structure.

SEA's also differ in their policies concerning SEA selection and explicit endorsement of "exemplary" educational programs or products. A number of the SEA's have, or are in the process of establishing, systematic procedures for reviewing and validating programs and for encouraging their use by LEA's. On the other hand, two SEA's take the position that the SEA should not directly endorse any particular product or program. Accordingly, those SEA's have no direct review or validation procedures.

Not surprisingly, SEA's vary in the extent to which their dissemination activities are governed by formalized and clearly-articulated policies. In part, the variance may be because of differences of opinion about the best management approach. The differences also seem to reflect different stages of planning and reorganization within the SEA's. SEA's also have other organizational differences such as having an elected versus appointed Chief Officer.

## Issues

A number of issues center around the definition and relative value of educational R & D. First, it is clear that the phrase "educational R & D outcome" has different meanings for different people. The question not only seeks a definitional response. It also, as asked by several SEA officials, suggests a skepticism about NIE's motives, apart from the official language of the RDX solicitation.

The suspicion expressed by some is that NIE may only be interested in marketing its own products. Other questions concerned where "R & D" stood in relation to NDN-approved products and products "validated" through other similar procedures. Several people asked about where the RDX fits in with other USOE and NIE dissemination-focused programs. Some SEA officials expressed a positive view toward the value of R & D outcomes in comparison with LEA-developed programs. Other SEA officials indicated that as a matter of priorities they felt the SEA should provide a forum for locally-developed products and ideas rather than spotlight R & D products.

At least one SEA official indicated that the RX's should be in a position to provide technical assistance to help implement its programs/products, if consumers request such assistance.

# DESCRIPTION OF INDIVIDUAL SEA'S

## ILLINOIS SEA

RX Contact Person

Project Manager, Illinois State Capacity Building Project and also the Dissemination Representative to the National Dissemination Leadership Project.

Under a newly appointed (1975) Superintendent of Public Instruction, the Illinois Office of Education (IOE) has undertaken a major effort to strengthen its services to local education agencies. The planning and reorganization has been undertaken through an NIE Capacity Building Grant. Progress has been made in a number of areas including the following items:

a. The state office was decentralized by dividing the state into five geographic regions, each served by a "Program Service Team" of SEA personnel (one such regional unit is described below).

b. A Title IV Committee has been established for coordinating state diffusion projects with the Capacity Building Project.

c. The same committee is working to establish coordination with the National Diffusion Network.

d. Systematic efforts are being made to identify and develop working relations with external educational resources such as ERIC, the Council of Chief State School Officers, the Illinois Library Network, and a PIP diffusion contractor, and the Bilingual Education Service Center.

e. An Educational Information Center has been established within the SEA's library. It contains the ERIC file and other educational resource materials.

In its second year of reorganization, the IOE, with the aid of the Capacity Building Grant, plans to work systematically to better coordinate and consolidate the various program services and resources existing within the agency, particularly dissemination activities of programs administered through the SEA. (Presently, numerous dissemination activities are operated more or less independently in the various different program areas within the SEA, in the absence of any overall coordination.) Through the use of needs assessment activities, conducted at the LEA level, the SEA hopes to initiate procedures for identifying what kinds of educational programs or resources are needed within the state and determining areas where appropriate resources to meet those needs are lacking. Further, the IOE hopes to expand the services provided through the Program Service Teams. The Program Services Teams are central to the SEA's plans to expand its services to LEA.

Program Service Teams are a relatively new intermediate division within IOE and were established in an attempt to provide a solely service function as opposed to a combined service-regulatory function performed by IOE specialists in the past. The service teams are direct extensions of IOE and are mandated to provide specific kinds of service. A more detailed description of the Program Service Teams follow. They are likely to become the most active of the four kinds of ISA's in the area of dissemination of R&D outcomes/products.

## Program Service Teams

Five Program Service Teams function as intermediate service agencies in the state of Illinois. The service teams became operational in January of 1976 as a result of reorganization of the State Department of Education. The basic rationale behind the reorganization was to separate service functions and regulatory functions. In the past, some individuals working out of the State Department functioned in both service and regulatory roles, and were perceived as a threat to LEA's. The newly established Program Service Teams function solely as service providers.

The Program Service Teams are funded by monies, both federal and state, which are funneled through the Illinois Office of Education (IOE). IOE makes basic policy for the service teams; thus, they function as an arm of the State Department. The four basic state-mandated service activities engaged in by the service teams are:

a. Providing problem-solving and planning assistance to LEA's. For example, a needs assessment package is being developed that will be used with LEA's, at their request, to aid them in planning programs to fit current and projected needs.

b. Assuming a resource brokerage role. For example, providing materials or product information to LEA's on request as well as maintaining a list of human resources representing a variety of specializations to which LEA's can call upon for assistance.

c. Serving as a communications link between the IOE and LEA's. For example, representatives of each Program Service Team meet on a monthly basis with state level staff to exchange ideas, new guidelines, and to share concerns including those expressed at the LEA level.

d. Providing technical assistance. For example, assisting LEA's develop proposals for special projects and identifying resources needed for existing projects.

Approximately 100 service team staff serve LEAs across the five service regions. The service team function implies a change in role for many staff. Thus, IOE is in the process of developing a comprehensive training program to facilitate the role change and to enhance staff ability to meet the needs of LEAs.

## Description of a Representative Program Service Team

One of the five Program Service Teams in the state is described here to highlight some of the major activities engaged in by all five service teams.

The Program Service Team serves a region covering 32 counties and includes approximately 220 LEA's. They are mandated to provide the four types of service outlined above and are funded with monies funneled through IOE. The team consists of 15 professional staff, each with a designated area of specialization.

Dissemination Activities

Activities related to the dissemination of R&D outcomes/products engaged in by the service team are limited to date as the team has only been operational for a short time. These activities will fall under the brokerage service function. Plans for the immediate future include working with Title I staff from the State Department to identify exemplary Title I projects as candidates for formal validation. In addition, tentative plans have been made to install a computer terminal in the team office which will provide access to a variety of kinds of educational information including ERIC.

Perceptions of team staff regarding the awareness level of LEA's to R&D outcomes/products suggest that for the most part information has not reached LEA's to any great extent. Team staff feel that they will be able to provide more information to LEA's when they are fully operational.

The service team cooperates with a variety of other educational groups/agencies in their service region. They work through the twenty-four county superintendents in the region. For example, they always inform the superintendent when they plan to visit schools within a particular district and they invite superintendents to participate in workshops held in their districts or involving staff of their districts. The team also cooperates with the eighteen special education directors as well as the two Area Service Centers for the Gifted in their service region. Contacts generally involve LEA's requests for specialized services to which the service team responds by putting them in contact with special education or gifted staff. Further, the service team maintains cooperative relationships with universities and community colleges in the region. These contacts are primarily through personal contacts of team staff with university and/or college staff.

Regional Exchange Planning

Service team staff responded favorably to the idea of a Regional Exchange. The following general comments and/or suggestions were made:

a. Exchange activities should not duplicate services already provided by other agencies.

b. A centralized library of products and information is a reasonable idea, however, individuals within the region are not likely to come to the information center. Rather, exchange staff may need to go to individuals/groups in the region with information on R&D outcomes/products.

c. Traveling workshops pertaining to consumer products and information would be useful if they focused on topics of interest to individuals/groups from several locations as opposed to just those from individual sites are able to attend.

Service team staff are probably in a good position to identify the needs and interests of LEA's in their service region. Thus, it may be efficient for Exchange staff to work through the service teams in identifying target needs and audiences.

At least three other types of intermediate service agencies operate in the state of Illinois including:

a. County superintendents

b. Special education directors

c. Area Service Centers for the Gifted

The county superintendents function somewhat as arms of the Illinois Office of Education. However, they are elected officials, and the degree of interest and participation in educational innovation varies widely from county to county.

Special education directors are direct extensions of the state. For the most part, they function by county; however, some have banded together to provide regionalized service.

The fourteen Area Service Centers for the Gifted are directly responsible to the director of the program for the gifted at the state level. However, they are semi-autonomous groups in that they submit an annual application to IOE to perform particular services to schools, and are thus funded on a contractual basis.

Our SEA's contacts expressed a positive interest in R&D outcomes as potentially valuable educational resources which ought to be readily accessible along with other educational resources. The state-wide needs assessment and greater coordination of SEA dissemination activities are seen as first steps toward more systematic usage of R&D.

Other educational agencies that were noted by SEA contacts as having some dissemination functions included the University of Illinois, two ERIC Clearinghouses, the Chicago Office of the SEA, the Bilingual Education Service Center, the PIP Diffusion Service Center, and fourteen Area Service Centers for the Gifted. In addition, the SEA was in the process of assuming responsibility for the activities of the NDN state facilitator.

Our conversations with SEA staff, including the deputy superintendent (Division of Program Services), the manager of LEA services and director of the

Capacity Building Project, and the manager of the Capacity Building Project indicates an enthusiastic interest in participating in the RX planning.

October 1976

# State Board of Education

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  (C 3850)
- **Equal Educational Opportunity**
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- **Fiscal**
  Chris Meuerges
  (C 2257)
- **Urban and Ethnic Education**
  Rita Dee (Acting)
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    Delmar E. Siegel
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    (4811)
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    William E. Reynolds
    (7084)
  - **Program Approval and Evaluation**
    (Vacant)
    (4876)
  - **Research and Development**
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  - **Special Programs**
    James Smith
    (5098)
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  William L. Grant
  (3471)
  - **Compensatory Education**
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    (6035)
  - **Educational Innovation and Support**
    (Vacant)
    (3810)
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  - **Textbook Program**
    Harold A. Cook
    (3471)
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  618/242-1676
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      (Acting) (C-5580)
    - **DeKalb Team**
      John G. Stoudt
      815/753-0281
    - **Springfield Team**
      Nan S. Spalding
      (5698)
    - **Urbana Team**
      Jerry D. Foster
      217/333-6770
    - **Mt. Vernon Team**
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    (2826)
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    - Curriculum Services
    - Educational Information Center
    - New Directions/Alternatives
    - Responsibility Education
    - Safety Education
    - School Transportation
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    Frank A. Woodcock
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    (4823)
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    Gordon L. Brown
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    Lawrence A. Broquet
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  - **Media Resource Center**
    William E. Lohman
    (4433)
  - **Teacher Education and Program Approval**
    Lawrence D. Freeman
    (5859)
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  Assistant Superintendent
  Bill K. Tilley
  (5075)
  - **Gifted Programs**
    Joyce Van Tassel
    (7830)
  - **Materials Development and Dissemination**
    Gloria F. Calovini
    (2436)
  - **Program for Exceptional Children**
    Joseph E. Fisher
    (6601)
  - **Pupil Personnel Services**
    Jean E. Garre
    (2446)

**MANAGEMENT SERVICES**
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(9741)

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    Charles L. Dravis
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    Michael C. Crowley
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  - **Community Relations**
    Eleanor Buehrig
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  - **Information and Publications**
    Dolores S. Kaufmann
    (1829)
  - **School Organization and Facilities**
    Richard K. Snowden
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  - **Student Affairs**
    Kenneth R. Midkiff
    (9546)
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  Assistant Superintendent
  Robert Leininger
  (6510)
  - **Governmental Research**
    Robert P. Clark
    (9862)
  - **Scholarships**
    Thomas J. Denny
    (7913)
  - **State Liaison**
    David F. Carey
    (6518)
- RECOGNITION AND SUPERVISION
  Assistant Superintendent
  (Vacant)
  (5517)
  - **Non Public School Approval**
    Roy McDermott
    (5517)
  - **Public School Approval**
    Enno S. Lietz
    (5517)

**Reception, Information & Conference Center***
Contact — Richard F. Short — 217/782-4321

Levels reporting to Assistant Superintendents are listed functionally in alphabetical order.

All telephone numbers are Springfield CENTREX unless otherwise shown. When using CENTREX dial "2" then the four digit number. Outside calls use Springfield Prefix 217/782. Numbers preceded by "C" are Chicago CENTREX. Outside calls dial Chicago Prefix 312/793.

## INDIANA SEA

RX Contact Person

> Associate Superintendent over the divisions of Pupil Personnel Services, Curriculum, Reading Effectiveness, and Compensatory Education and also responsibility for the Arts Commission, Textbook Commission, and Administrative Handbook Revision.

The dissemination activities of the 26 separate divisions and programs in the department are largely decentralized. The department is presently considering revising its dissemination policies and practices with the help of an NIE Special Purpose planning grant. In addition to the activities supported by the planning grant, a special planning group has been established within the department to consider future dissemination policies and the related areas of responsibility within the department.

To an extent dissemination activities do flow through a central source when the information is in the form of printed materials. The Division of Public Information and Publications provides printing and mailing services for the SEA. However, that division does not exercise direct influence on the substance of the information.

Several divisions publish their own newsletters. One SEA quarterly newsletter, the Hoosier School Master, highlights a particular division focuses on various topical issues, such as Title IV, in each edition. The School Master is distributed to all teachers, superintendents, and schools of education within the state.

The substance of the dissemination activities includes informational brochures, memo-type announcements, the newsletters noted above, orientation and training workshops and conferences, and audio-visual loan services (for films mainly).

Indiana has begun to establish Intermediate Service Agencies within the past five years and now has one Regional Service Center the Northern Regional Service Center in South Bend, in operation. With its own director, professional staff of about 20 subject matter specialists, newsletter, and film service the Northern Regional Service Center functions like a "mini-SEA." Its primary audience is comprised of the LEAs in its service region.

The SEA contact indicated that it avoids endorsing particular materials or products through its dissemination activities, though available information will be provided concerning "strengths and weaknesses" of particular products. Such information is generally provided by the subject matter specialists, the "consultants" within the SEA. The SEA's allocation of ESEA Title IV funding to support the adoption of innovative and exemplary educational programs is another means of encouraging LEAs to seek and adopt new promising practices. The SEA also refers LEA requests for information about successful and innovative programs to the NDN state facilitator in Logansport.

## STATE SUPERINTENDENT
## HAROLD H. NEGLEY

Room 229, State House
Indianapolis, Indiana 46204
317/633-5640

**Administrative Assistants**
F. Bradford Johnson, 317/633-5618
Julius Shaw, 317/633-5426
Room 229, State House
Indianapolis, Indiana 46204

**September, 1976**
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## IOWA SEA

RX Contact Person

Deputy Superintendent, Department of Public Instruction

The Iowa State Department of Public Instruction (DPI) provides service to LEA's through the Office of the Superintendent and six program branches: Administration; Planning and Management Information; Instruction and Professional Education; Pupil Personnel Services; Area Schools and Career Education; and Rehabilitation Education and Services. The dissemination of educational products and information is carried out with each branch at the program level. At this time, there is not a unifying set of policies regarding product endorsement and dissemination. One centralized mechanism for disseminating educational information in INFORMS (Iowa Network for Obtaining Resource Materials for Schools). This is explained below.

Across program areas, a variety of dissemination activities take place. A sample of the kinds of activities is listed below.

a. The Publications Unit publishes several newsletters directed to various audiences in the educational community. For example, *NOW* (News Of the Week) is an internal news mechanism published weekly and circulated to all DPI staff. The *DPI Dispatch* deals with specific DPI information and is circulated to key educators in the state on a monthly basis. *DPI Outreach* is circulated weekly and deals with current key issues in education, new federal programs and policies, and program activities across all branches of DPI. The newsletter is sent to key educators (600-700) in the state including school superintendents, college and university staff, educational organizations such as the Iowa State Education Association, and Area Education agency administrators. The *DPI Outreach* comes from the State Superintendent's office. Program-specific information for the newsletter is submitted to his office by staff at the program level.

b. The Curriculum Division of the Instruction and Professional Education Branch is involved in developing information brochures and flyers pertaining to new curriculum products and information.

c. INFORMS is an information dissemination service which operates through the Instruction and Professional Education Branch of DPI. INFORMS is an operational network of computerized information search and retrieval capabilities. It serves teachers and administrators in local school districts, Area Education Agency personnel, DPI and other State Agency personnel. Each of the 15 Area Education Agencies (AEA's) across the state have one staff person who is trained in INFORMS procedures and who serves as an INFORMS liaison to AEA staff and LEA's in the AEA service area. The primary goal of INFORMS has been to improve decision-making of teachers and administrators at the classroom level by providing them with up-to-date information on educational methods and curriculum development. This is accomplished by assembling and disseminating relevant information on requested topics. Information provided to local teachers and administrators varies according to types of questions received.

d. At the program level, DPI staff is involved in a variety of dissemination activities. For example, in both career education and special education, awareness information is disseminated and training workshops are conducted. In mathematics/science education, math supervisors were recently organized to develop performance objectives and assessment/diagnostic approaches for grades 5 and 8. Further, metric education and IGE workshops are held. In social science education, awareness information is disseminated and conferences and seminars are held.

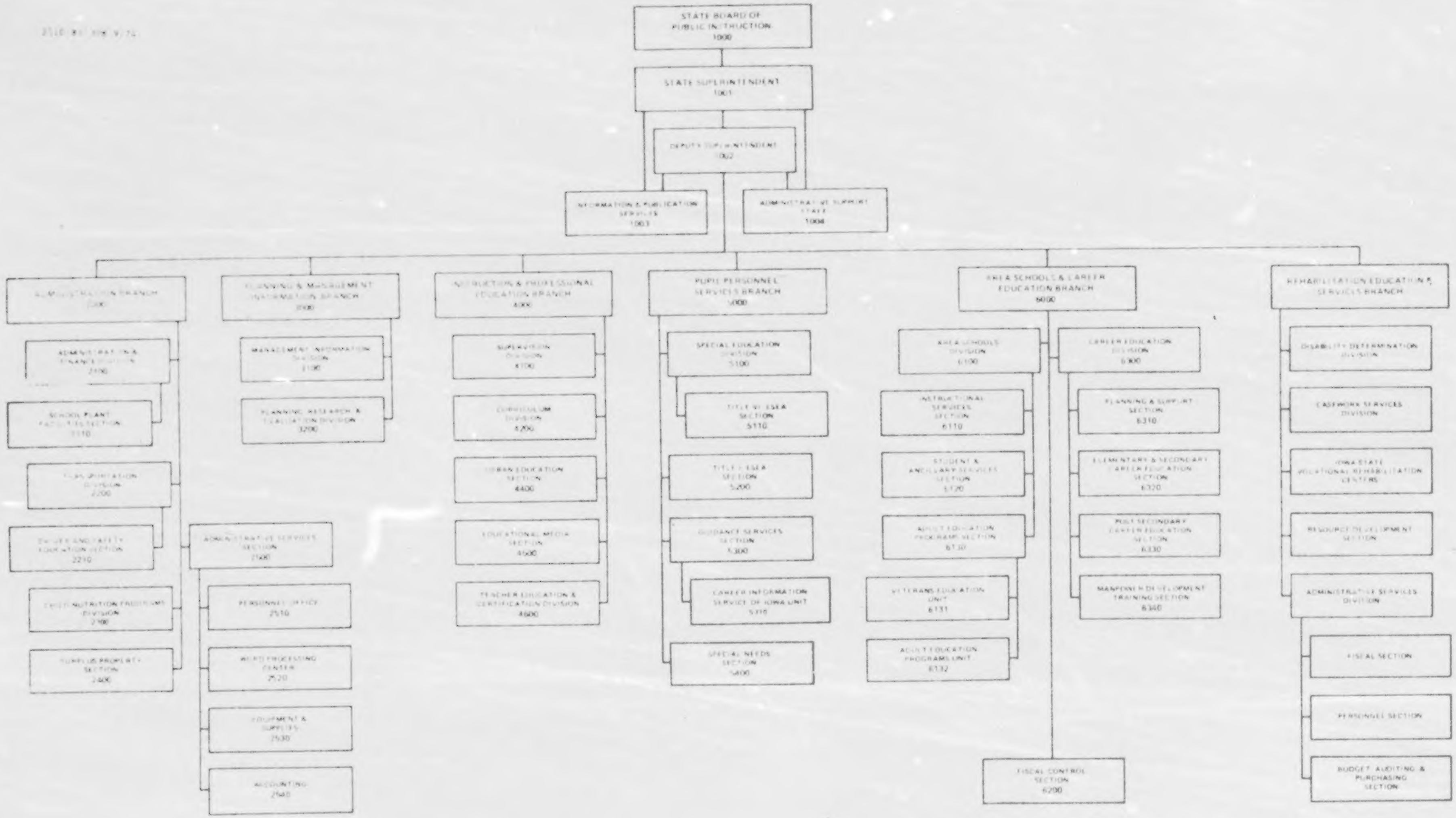
Dissemination activities specifically related to R & D outcomes/products generally fall within the program responsibilites of the Planning, Research, and Evaluation Division. Staff of this division work closely with the State Facilitator. They use Educational Programs That Work, the NDN catalogue, as a source of JDRP approved programs. Division staff provide information on "validated" programs to interested LEA's and place LEA's in contact with Developer/Demonstrator projects and /or the State Facilitator on request.

DPI staff also works closely with and through the Area Education Agencies across the state to disseminate information pertaining to R & D outcomes/products.

Fifteen education agencies serve as intermediate units in Iowa. The agencies are an extension of the State Department for services related to media and special education. An optional service area, general educational services not mandated by the state, is provided to some degree by most of the 15 agencies. Educational services include inservice training, planned research and development, data processing, curriculum services, guidance services, etc. Area superintendents serve the agencies in an advisory capacity and each is governed by a board of directors. Program plans in each of the service areas are developed annually at the agency level and are subject to state approval. Agencies are funded on the basis of the number of pupils served with state and local monies, funneled through the State Department of Education. The largest AEA in the state, #11, has 360 full-time staff who serve 11 counties, 63 school districts, 360 school buildings, 6,000 teachers, and 130,000 students. The R & D related products/information disseminated by the AEA 's are generally those provided to them by the State Facilitator which include the approximately 180 NDN programs.

.Officials of the Department of Public Instruction are interested in establishing practical dissemination strategies which can be implemented statewide. Limited planning and coordinating activities are under way and improved practices will be encorporated as available. The Department is extremely concerned of the apparent lack of coordination of the principal agencies in the Division of Education. The agency has submitted materials to the Office of the Assistant Secretary in an attempt to assist in the development of sound procedures and also to encourage coordination of dissemination at the Federal level. Department officials feel that if dissemination activities are permitted to be uncoordinated at that level, then it is pracically impossible for state agencies to be effective or efficient with dissemination activities.

# DEPARTMENT OF PUBLIC INSTRUCTION ORGANIZATION


STATE BOARD OF PUBLIC INSTRUCTION 1000
STATE SUPERINTENDENT 1001
DEPUTY SUPERINTENDENT 1002
INFORMATION & PUBLICATION SERVICES 1003
ADMINISTRATIVE SUPPORT STAFF 1004
ADMINISTRATION BRANCH 2000
ADMINISTRATION & FINANCE DIVISION 2100
SCHOOL PLANT FACILITIES SECTION 2110
TRANSPORTATION DIVISION 2200
DRIVER AND SAFETY EDUCATION SECTION 2210
CHILD NUTRITION PROGRAMS DIVISION 2300
SURPLUS PROPERTY SECTION 2400
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WORD PROCESSING CENTER 2520
EQUIPMENT & SUPPLIES 2530
ACCOUNTING 2540
PLANNING & MANAGEMENT INFORMATION BRANCH 3000
MANAGEMENT INFORMATION DIVISION 3100
PLANNING, RESEARCH & EVALUATION DIVISION 3200
INSTRUCTION & PROFESSIONAL EDUCATION BRANCH 4000
SUPERVISION DIVISION 4100
CURRICULUM DIVISION 4200
URBAN EDUCATION SECTION 4400
EDUCATIONAL MEDIA SECTION 4500
TEACHER EDUCATION & CERTIFICATION DIVISION 4600
PUPIL PERSONNEL SERVICES BRANCH 5000
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TITLE VI ESEA SECTION 5110
TITLE I ESEA SECTION 5200
GUIDANCE SERVICES SECTION 5300
CAREER INFORMATION SERVICE OF IOWA UNIT 5310
SPECIAL NEEDS SECTION 5400
AREA SCHOOLS & CAREER EDUCATION BRANCH 6000
AREA SCHOOLS DIVISION 6100
INSTRUCTIONAL SERVICES SECTION 6110
STUDENT & ANCILLARY SERVICES SECTION 6120
ADULT EDUCATION PROGRAMS SECTION 6130
VETERANS EDUCATION UNIT 6131
ADULT EDUCATION PROGRAMS UNIT 6132
CAREER EDUCATION DIVISION 6300
PLANNING & SUPPORT SECTION 6310
ELEMENTARY & SECONDARY CAREER EDUCATION SECTION 6320
POST SECONDARY CAREER EDUCATION SECTION 6330
MANPOWER DEVELOPMENT TRAINING SECTION 6340
FISCAL CONTROL SECTION 6200
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DISABILITY DETERMINATION DIVISION
CASEWORK SERVICES DIVISION
IOWA STATE VOCATIONAL REHABILITATION CENTERS
RESOURCE DEVELOPMENT SECTION
ADMINISTRATIVE SERVICES DIVISION
FISCAL SECTION
PERSONNEL SECTION
BUDGET, AUDITING & PURCHASING SECTION

## KANSAS SEA

RX Contact Person

Director, KEDDS Resource System, State Department of Education.

As a result of a recent mandate from the Commissioner of Education, all state level dissemination activities in the area of education are routed through the Kansas Educational Dissemination/Diffusion System (KEDDS). The goals and priorities of KEDDS, as developed by the state department, follow.

The KEDDS model includes three elements: a resource component; clients (users); and a linking component. The following description of each component is quoted from a state department document.

> ### Resource Component
>
> The resource component is located within the Kansas State Department of Education as part of the Division of Education Services within the section of Educational Improvements and Development. The goal of the resource system is to collect in a central place the information and knowledge available concerning research, consultant help, successful practices, validated programs, and other information that users need in assisting them in making decisions regarding improvement of learning. Some of the help now available from the Resource system are:
>
> 1. ERIC, Dialog and other information bases containing the latest educational research and knowledge.
> 2. File of Kansas Promising practices.
> 3. Material and program abstracts from the nationally validated projects in the National Diffusion Network.
> 4. Nine regional centers to make service available to local users.
> 5. Under development is a consultant file of local people available to assist local schools. (KSDE staff, University staff, and others who have the ability to help local schools with specific problems.)

### Clients

Clients are defined as any educational organization that requests help in solving or working on a problem which has been identified as important. This could mean that some organizations would be both clients and part of the resource pool, depending on the situation. KSDE or Universities and colleges are good examples of this.

### Linking Components

The linking component is composed of a staff of six professional facilitators plus support staff. The Linkage component staff is housed in Wichita. These facilitators serve as helpers to local school districts in developing a process in their school that will assist them in implementing new educational programs, and in helping LEAs find the resources necessary to make them successful at change. Some of the activities carried out by the facilitator are:

1. Problem clarification
2. Organization Consulting
3. Decision Making workshops (Communication skills, change agenc training, team decision making, conflict resolution use of information systems.)
4. Assistance in training
5. Assistance in finding resources
6. Assistance in planning for change
7. Assistance in developing community support
8. Assistance in whatever seems appropriate for LEA successful implementation

One of the perceived functions of the program is to develop local leadership to combine the resource and linking function. A perceived strength of the system is that it provides a central focus for dissemination. Future planning includes expanding the system to include the NIE catalog of completed programs as well as other exemplary programs. The number of staff is also being increased.

## GOAL STATEMENTS FOR THE KANSAS STATE BOARD OF EDUCATION

Adopted July 13, 1976

1. The State Board of Education will recommend and support legislation which ensures positive and progressive development of an educational system in Kansas based on identified needs and a periodic evaluation of current and future educational programs.

### The Goal and Objectives of the Kansas Educational Dissemination/Diffusion System (KEDDS)

Goal: To provide local Kansas school districts and the KSDE with the available information and knowledge concerning successful practices that will meet locally identified needs, and to help provide the training and assistance necessary to make new educational programs successful.

Objective 1: Develop a staff of qualified persons in the area of information systems and dissemination services to meet the needs of Kansas schools and the KSDE

Objective 2: To develop a staff of persons with the diffusion skills of linking agents, who will work interactively with KSDE and local schools to promote adoption of successful practices.

Objective 3: To conduct awareness and informational workshops and activities so that local school districts and the staff of KSDE become knowledgeable concerning the services of a dissemination/diffusion system.

Objective 4: Over a period of two years, work interactively with at least 50 school districts in adopting/adapting new programs, based upon their identified needs.

Objective 5: Over a period of a year, at least 75% of the school districts in Kansas will utilize the Resource system, to assist them with a local problem.

Objective 6: To develop staff members of KSDE and others as resources in the KEDDS system and utilize these resources at least 60 times during the current year.

Objective 7: To work in such a way with local school districts so that the school organization is left with a problem solving self renewing, process that encourages such school districts to develop their own process and re-enter the KEDDS system.

Objective 8: To work with KSDE and provide at least two in-depth staff development activities during the year, based upon those activities identified by the Department Administration.

Perceptions of interest in R&D outcomes include:

1. The products and programs in the Directory of Educational Promising Practices and National Dissemination Network have been placed in the current system. However, there is a low general awareness of the existence of R&D outcomes.

2. There have been few requests for NIE sponsored R&D products, but considerable demand for validated Title III programs and products.

3. There is considerable interest among state department personnel in expanding the system and improving use of R&D outcomes in the future. The KEDDS System is already funded and the expansion of the system to include R&D products is a normal expectation.

Some of the non-SEA Dissemination Activities in the state include:

1. Kansas National Educations Group: plans an information center and a library to be located in KNEA Building, Topeka, Kansas.

2. Kansas State Board Association: provides a computer service to Kansas educators to complete school records. It is housed in Topeka Kansas.

3. Kansas State Library Services for college students only.

4. Regional Media Centers in some schools but influence is local in nature.

5. Cooperative Education Group in Colby, Kansas provides services in special education.

State level staff expressed great interest in becoming involved in planning and offering suggestions for the regional exchange based on the past experiences of Project Communicate. One suggestion for exchange planning pertains to needed communication among all interested groups--to share ideas for imporved coordination and utilization of what has been developed.

## MICHIGAN SEA

RX Contact Person

Coordinator, Dissemination/Diffusion Unit, Experimental Demonstration Centers Program;

The Michigan Department of Education has had a long-standing interest in the diffusion/dissemination of promising programs and practices into the state.

The department responded to the first NIE RFP concerning "Special Purpose and Capacity Building Grants." Since they were not successful in securing a grant upon their initial effort, the department decided to begin to establish a dissemination system utilizing its own state funds and where appropriate Title III funds. When 1976 RFP's were released, the department submitted two proposals, one for a capacity building grant and one for a utilization grant to introduce career education programs. Both were funded through the Office of Planning.

In the meantime, the department established a unit titled "Dissemination/ Diffusion Unit" now under the direction of Dr. John Osborne. This unit is a part of the "Experimental and Demonstration Centers Program." One particular dissemination outgrowth of the "Dissemination/Diffusion Unit" is the Michigan Adoption Program.

State funds for the purpose of introducing new and innovative programs and promising practices are equally available to each school district (LEA) in the state through the Michigan Adoption Program. Four levels of involvement have been established, each with its own set of criteria which must be met before the next level can be attained. The four levels in order of attainment are as follows:

1. Planning
2. Developmental
3. Experimental
4. Demonstration

The department has established within the state its own JDRP, the Classification Committee. This committee measures innovative programs against a specified criteria. Once approved by the committee, state funds are made available for any school district in the state to adopt that program if it meets a need or interest for that setting. Twenty-five programs identified as demonstration sites are now approved for the adoption process.

The steps in the Michigan Adoption Program are as follows:

a. Awareness of a program.

b. Letter of interest from the LEA for a program.

c. Acquisition of information at a knowledge level of the potential program.

d. Acquisition of decision-making information about a program.

e. Statement of assurances to make the program work. (Decision to be trained.)

f. Training of potential implementors.

g. Trial installation of the program.

h. Installation, maintenance, expansion of the program.

Once the steps are begun, state funds are available to assist school districts to initiate a trial installation.

Two basic types of intermediate service agencies operate in the state of Michigan--intermediate school districts (ISD's) and supplementary centers, serving regional educational service areas (RESA's). In addition, there are 22 regional media centers (REMC's) and 50 planning districts that provide career education services (CEPD's).

Fifty-eight intermediate school districts operate in the state of Michigan. The specific services provided to any individual LEA are, for the most part, determined by local need. However, ISD's are mandated by the state to provide service in two basic areas--special education and general education. Strategies for delivery of service vary across ISD's as do staffing patterns and facilities. One ISD in the state serves 36 local school districts including Detroit. The agency is staffed with 70 professional consultants who serve as specialists in a variety of areas. The consultants provide direct service to LEA's. A second ISD, organized on a similar basis, also maintains a sophisticated computerized information retrieval capability that provides access to ERIC and other information systems.

The nature and degree of dissemination activities and the saliency of R & D outcomes/products in the context of these activities again varies across ISD's.

Supplementary centers in four Regional Educational Service Areas were established in January 1976 to focus on diffusion and dissemination activities. The service areas extend across ISD boundaries and are independent areas, each with their own tax base. Each center is staffed with three to four full-time professionals. Diffusion/dissemination strategies vary across the four centers. Brief descriptions of three centers follow. One of the four centers is not fully operational to date. Plans call for eight RESA's in the future to cover the entire state.

Project VALUE, operating in one of the RESA's, is involved this year in disseminating 25 Michigan validated projects. Plans have been made to incorporate the approximately 180 NDN projects into this pool. Special monies go to school districts desiring to try these projects with the stipulation that they agree to confirm to Michigan's four-step validation process. Project VALUE staff communicate to LEA's primarily through "linkers" in each school district who serve as the LEA representative to Project VALUE staff. The linkers in the RESA meet regularly as a group with project staff. The project is staffed by three full-time professionals working in the area of information services, field liaison, and training. Dissemination strategies emphasize "human linkers" and one staff member is full-time in the field making personal contacts with LEA's.

The supplementary center in another RESA emphasizes computerized information retrieval as a dissemination strategy. Five hundred computer terminals, one in each school in the area, provide local access to information on educational programs in NDN format.

A third supplementary center serving a grouping of RESA's also emphasizes human contact in the diffusion/dissemination process. Information is disseminated through part-time professionals working within six major school districts.

Michigan is interested in increasing its "pool" of programs and promising practices. It has, in addition to promoting the 25 approved programs mentioned, continued to encourage development and recognition of promising programs and practices within the state plus has the following program pool access.

a. The state, in collaboration with seven states, has created a loosely organized "Interstate Network Consortium for Diffusion and Dissemination of Educational Programs." Each state has submitted a group of validated programs from its state and the pool now consists of 81 programs. A catalogue describing these programs is due off the press this fall.*

b. The state plans to access the 150 plus validated programs that will be included in the National Diffusion Network. Title IV funds should make these programs available in Michigan.

c. State officials indicated an interest in studying ways to include the quantity of R & D resources to its pool.

The state previously had a single state-wide state facilitator project, Project INFORM, under the NDN Title III set-up. Its functions will be covered by the four Regional Supplemental Centers. Funding from OE's Title IV program will be utilized to maintain this activity in Michigan.

State level staff expressed considerable interest in becoming involved in Regional Exchange planning efforts.

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*Includes states of Michigan, Minnesota, Wisconsin, Ohio, Indiana, Illinois, and Missouri.

## MINNESOTA SEA

RX Contact Person

Assistant Commissioner, Division of Planning and Development, State Department of Education; Coordinator, Capacity Building Project

To meet educational needs within the state, Minnesota has established independent school districts (LEA's), one special school district (Minneapolis), and over a period of time have created special education units, media units, and vocational units.

State-wide dissemination efforts are being developed through a '76 Capacity Building Grant from NIE. The grant provides for a new use of the intermediate service units, Educational Cooperative Service Units (ECSUs). These units were recently legimitized by the state legislature. One ECSU has been identified as a target unit for capacity building. The dissemination coordination function will be housed in this unit, which is operational at this time. Seven additional ECSUs are planned. Each ECSU will provide services (including special education, vocational and media services) to LEAs within its boundaries.

The state has had three state facilitators under Title III NDN and has maintained those operations with state funds awaiting Title IV funding. The Education Department- ment has been well pleased with the work of the three state facilitator groups and plans to continue and strengthen that activity.

The department has validated 15 programs within the state in addition to those recognized in the NDN JDRP validation. The St. Paul Open School Project is a Developer/Demonstration site for the NDN. School districts may on a competitive basis, apply for validated program installation funds up to $10,000 for one year. A pool of $150,000 is available through the state for this activity.

SEA officials state that there are no specific priorities for education in the state, however one major piece of state legislation affecting each LEA is the Planning, Evaluating, Reporting Bill.

State level staff expressed an interest in the proposed activities of the Regional Exchange.

## MISSOURI SEA

RX Contact Person

> Director, Research Coordinating Unit, Director of Missouri's Special Purpose Grant from NIE, Dissemination Representative to the National Dissemination Leadership Project (and a member of the Project's Steering Committee).

Dissemination within the SEA emanates independently from program divisions, within the agency and from the Instructional Division. Within the programs such as Title I ESEA, Title III, Special Education and Vocational Education, the dissemination activities typically reflect the guidelines and requirements mandated by the federal legislation and policies. The activities vary from the mailing of brief informational brochures to the provision of extensive technical assistance workshops (in the case of Vocational Education).

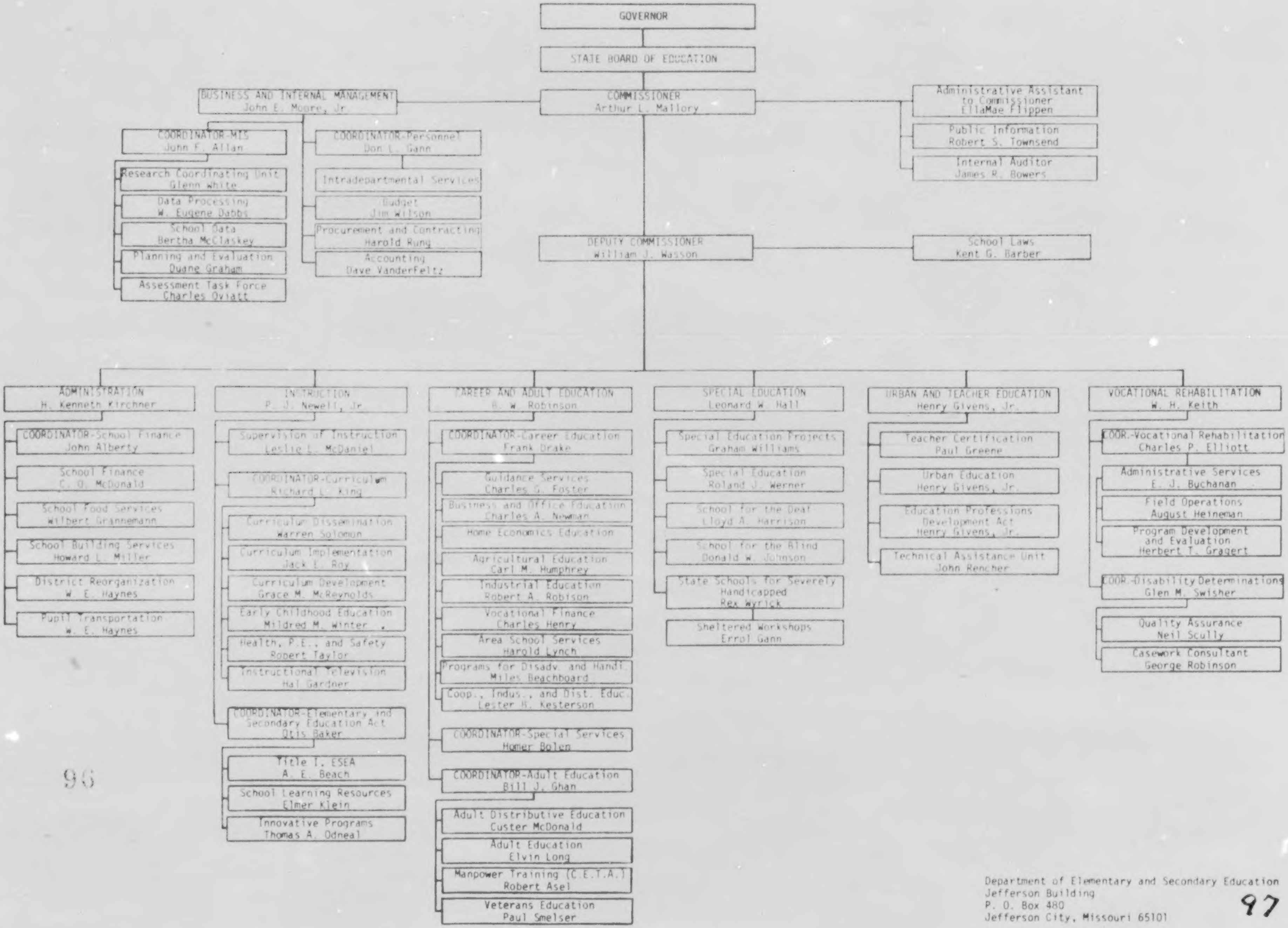
Within the Division of Instruction, additional dissemination activities take place and there is a staff person who has formal responsibility for curriculum dissemination. The division issues a monthly newsletter, The Curriculum Memo, that is directed primarily toward all teachers and building administrators. The newsletter spotlights various note-worthy classroom activities and ideas used in schools in the state and also provides brief descriptions of activities within the SEA that affect teachers.

The Division of Instruction also organizes topical education fairs for the purpose of sharing ideas among the state's teachers and school administrators.

In addition to the kinds of dissemination activities described above, the SEA may undertake special, highly focused dissemination activities to support a high-priority SEA project. For example, the SEA has recently initiated activities to inform and train LEA's in the use of a newly-developed competency test which the SEA hopes will be used in LEA's throughout the state.

The state is divided into eleven supervisory districts, each with a staff person. However, their functions are largely regulatory. The SEA is planning, with the aid of an NIE Special Purpose Grant to train "linker agents" to assist in dissemination and technical assistance within their own institutional settings (universities, for example). However, the planning is still in the early stages.

In the SEA's discussion of dissemination activities and policies, two elements stand out. First, the focus of dissemination is on "ideas" more than materials. In keeping with that principle, the SEA avoids endorsing specific materials, such as a particular textbook, or a list of materials. Instead, the SEA takes the position of informing LEA's about alternative products, rather than endorsing a particular product. SEA officials indicated that such endorsement would necessitate considerably more staff time and resources than is presently available in the SEA to carefully review and screen materials. Also, the SEA officials held that the burden for selection of educational programs and materials should properly fall on LEA's, not the SEA.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## NEBRASKA SEA

RX Contact Person

Assistant Commissioner of Education

The following items highlight the SEA's dissemination activities:

a. Information is sent out on State of Education Board Meetings by Information and Publications Services.

b. Curriculum guides, aids, and associated materials are disseminated by Curriculum staff.

c. Information on all Title programs is coordinated and disseminated by Program Directors.

d. Information on Vocational Education Research is disseminated by Director of Research Coordinating Unit.

### SEA Dissemination Policies

One of the policies of this nature related to textbook selection. In Nebraska the selection of textbooks, choice of all media and supplemental reference for the instructional program, and teaching methods, techniques and strategies are all local school prerogatives. However, the State Department of Education periodically issues guidelines of the selection of textbooks which are available to all school districts. The last guideline document was issued in April 1976 and identified the pros and cons of using textbooks as a major instructional vehicle. This four-page document also makes a reference to other agencies who evaluate and rate textbooks. Also, a policy position letter was issued in January 1976 by the State Commissioner of Education dealing with teaching of controversial issues.

Exemplary programs throughout the state of Nebraska are identified by the Title VI State Education Officers.

### SEA Organizations for Serving LEA's

County offices and educational Service Units both function as intermediate service agencies in the state of Nebraska.

County Offices. County offices, each with a superintendent and a three-member board of education, serve the approximately 1,156 school systems in the State. The county offices are extensions of the state, however, there is much variation among them regarding programming as well as interest and activity in new educational products. For the most part, county superintendents are primarily involved in processing the budget, teacher certification, and other administrative duties.

Educational Service Units. Seventeen Educational Service Units, each serving approximately ten to fifteen counties, plus two units in Lincoln and Omaha, operate as intermediate service agencies in the state of Nebraska. The service units are not directly regulated by the state and each has its own tax base up to a statutory limit of one mill on all properties. The original function of the service units was to provide supplementary services to all of the school districts in Nebraska. Districts have the option of contracting with the service units for these services but are not obligated to do so. A variety of other services are provided by the service units across the state, however, there are wide differences among units in terms of the number and kinds of services provided. Each Educational Service Unit has an elected board plus an advisory board made up of the county superintendents of the service region. These groups influence the types of service provided by each unit. While the awareness level of intermediate and local agency staff regarding R & D outcomes/products varies across the state, there seems to be a greater awareness in the eastern, less rural part of the state.

Other key educational agencies in the state of Nebraska consist of the State Facilitator project under the supervision of U.S. Office of Education.

The major state education dissemination activity at the present time is a proposed capacity grant for dissemination of information. The purpose of this proposed activity is to establish a state-wide comprehensive system for dissemination of technical educational information. It will include all Nebraska educators as target audience and will include a reference system including ERIC. A principle strategy will include the coordination of a system which educational linkers will relay information to the State Department of Education. The principle advantage of proposed system is to provide access to information not presently available and to provide coordination of services within one central location.

All planned future state education dissemination activities hinge upon the capacity building proposal becoming operational and/or Education Service Units coming under the supervision of the State Department of Education.

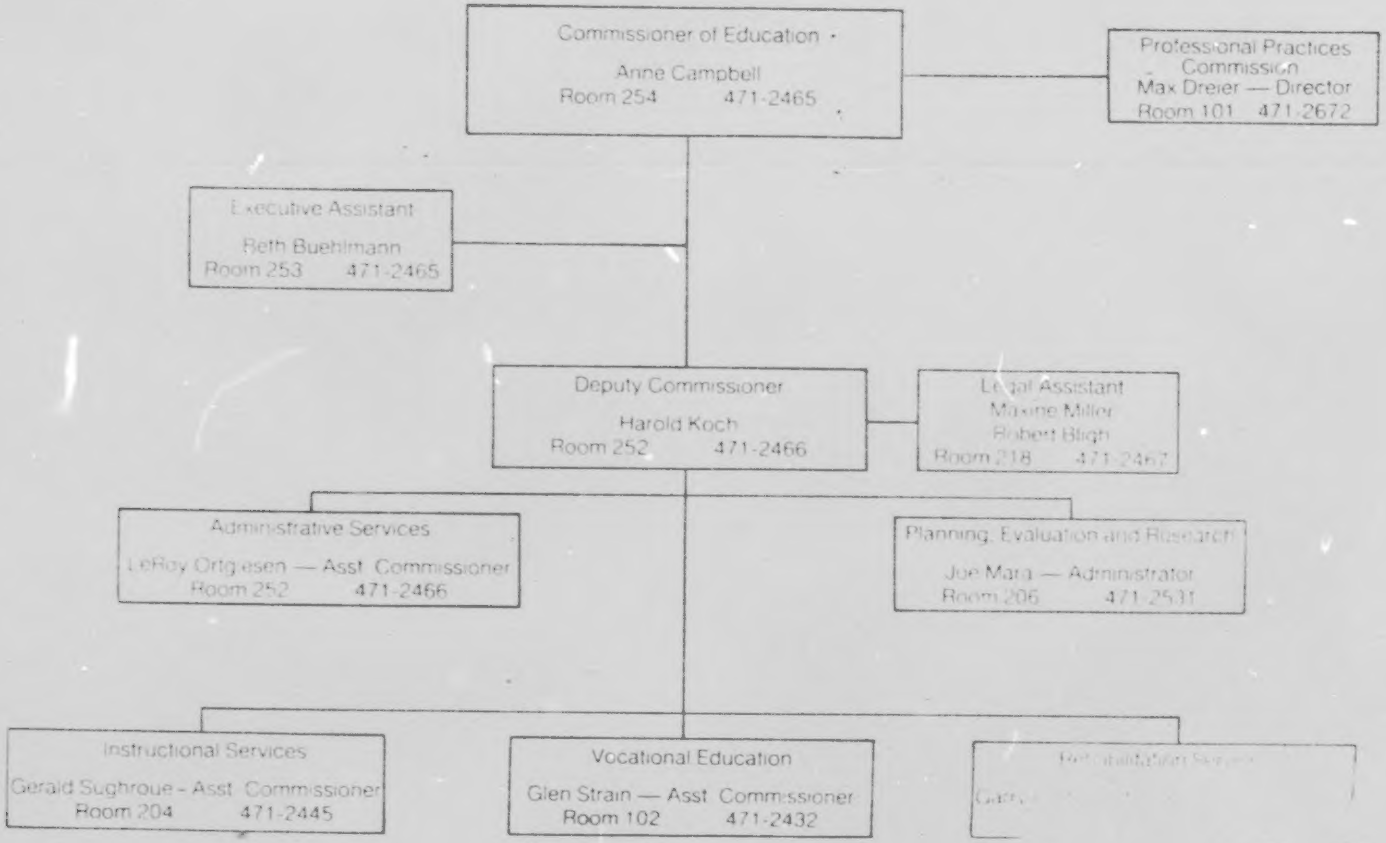
Some of the principle weaknesses of the present dissemination activities are a lack of coordination and collaborative planning. Also, there is very limited contact with R & D products and programs. There are deficiencies in the type of follow-up services provided and not enough materials are available. A planned program of dissemination that is adequately staffed and coordinated is a vital necessity.

Out-of-state contacts are made with personnel assigned to other capacity building programs and with Chief State School Officers.

The role of research and development usage outside of Lincoln and Omaha seems very limited.

A suggestion for proposed exchange activities is that they should expand coordinate, and enhance individual efforts currently being carried out in dissemination rather than substituting for them or duplicating them.

## DEPARTMENT OF EDUCATION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Room 206 471-2531
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Gerald Sughroue - Asst. Commissioner
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Room 102 471-2432
Rehabilitation Services

## OHIO SEA

RX Contact Person

Director, Division of Planning and Evaluation, and Dissemination Representative to the National Dissemination and Leadership Project.

There are several kinds of communication of information within and from the SEA. The Superintendent of Education issues a monthly newsletter, The School Slate, to all school superintendents and to each school building in the state, boards of education, and PTA representatives (approximately 16,000 recipients). Also, the Superintendent issues regular memo-type correspondance to school superintendents on matters of state-wide concern i.e., new legislation, new policies, etc. Within the SEA a bi-weekly newsletter is used for internal communications among the various divisions.

Each division within the agency operates with a great deal of autonomy with respect to dissemination. Each division has its own substantive focus and special constituency to an extent. Some divisions take a more active role in dissemination than others; Vocational Education is a notable example. Many of the divisions issue their own newsletters. For example, the Evaluation Division has a bi-monthly newsletter, as does Special Education, Elementary and Secondary Education, and Guidance and Testing, to name a few. Some divisions hold yearly teachers' meetings to encourage idea sharing, to focus on curricular issues, and to consider new teaching methodologies, and the like. Some divisions or programs, such as Federal Assistance function primarily in a regulatory capacity and do little dissemination.

The content of all printed dissemination matter must be reviewed and approved by the Assistant Superintendent responsible for his or her division. It then goes to publications for review of form before printing and distribution.

The SEA conducts a number of other dissemination related activities aimed specifically at LEA's. First, the SEA uses the state-wide educational T.V. network to communicate with teachers and school administrators on such matters as the availability of teacher grants. By using "spot announcements" the SEA is able to reach a wide audience in a timely manner.

Second, a newly created Educational Redesign and Renewal Division, is developing a dissemination approach that depends on building principals to provide in-service training. It is hoped that building principals, with adequate information and materials from the SEA, can provide the kind of face-to-face dissemination and in-service training that SEA is unable to provide without drastically increasing its staff. The approach attempts to identify and/or develop resource materials which can be readily relayed to teachers through in-service training conducted by building principals. Resource materials include such items as a "Bicentennial Source Book" and a "Parents Guide to Metric Education."

Still another dissemination approach involves the SEA's efforts to facilitate the spread of educational practices that are "successful, educationally worthwhile, and worth sharing" among the state's LEA's. Through the use of Title IVC funds the SEA has initiated the following three projects to systematically aid such sharing: (a) The Adaptation Process; (b) Instructional Materials Exchange; and (c) Teacher Grants.

> Through the Adaptation Process the SEA has initiated systematic procedures for identifying "successful and educationally worthwhile" education programs or "projects," for preparing concise replication instructions for each identified project, and for providing financial and technical assistance to LEA's that desire to install and "adapt" one of the projects. (The term "adaptation" is used by SEA officials because they believed it is a more accurate characterization of the interactive change process than the term "adoption.") The list of identified projects includes selected projects or products from educational labs, from the NDN list of validated projects, and Ohio projects identified and validated by the SEA. Selection criteria require that a project be cost-effective (that it can be installed and continued at a relatively low cost), that the project be "packageable," and that the project can be implemented without major additions of new personnel or equipment.
>
> Locally identified projects are made available for installation by means of a brief "procedural guide" written by the project director with modest financial support ($500) by the SEA. The procedural guides are prepared according to a standard format specified by the SEA. The SEA then supports other LEA's attempts to implement selected projects by providing each $8,000-10,000 for materials and in-service training if an LEA request for assistance is approved. Last year, 181 such supported "adaptation" projects took place.
>
> The Instructional Materials Exchange also attempts to facilitate the sharing of "successful and educationally worthwhile" ideas that are adaptable to other schools. However, the focus of the Instructional Materials Exchange is on ideas, practices, or products that require only the specific materials in order to be readily adaptable. The materials include such items as a booklet on how to conduct "walking tours" in areas surrounding a school and a "volunteer booklet." The SEA makes the materials available at no cost to interested LEA's.
>
> Teacher Grants of $600-1,000 each provide the SEA still another mechanism for encouraging teachers to develop and share successful and worthwhile ideas and practices. For example, in one such project a mathematics teacher is receiving financial support to conduct and carefully describe a project in which students apply skills in mathematics and descriptive statistics by surveying and profiling the student population in their school.

At a more general policy-making level an Internal Executive Planning Council, comprised of the Superintendent, Assistant Superintendent, and the Director of Planning and Evaluation, meets regularly to discuss and coordinate all SEA communications and dissemination policies and practices. Also, the SEA will soon issue a 20-25 page booklet that describes the agency's validation procedures. The SEA will encourage the adapted projects to undergo state validation, but validation will be optional.

Ohio has two kinds of Intermediate Service Agencies (ISA's), County Offices and Special Education Regional Centers. The 88 County Offices serve the approximately 400 local schools in county districts in the state. (The state has three separate kinds of school districts, "city districts," "exempted village districts," and "local schools in county districts," mainly rural schools.) City and exempted village districts have little direct involvement with County Offices and no involvement is required.

The County Offices are subsidized by the SEA on a per pupil basis for the county schools served. The County Office provides a variety of services, which vary from one County Office to another, including psychological testing, A.V. and resource materials library, cooperative purchasing (many of the county superintendents have background in school finance,) and health services.

The 18 Special Education Regional Centers (SERC) have quasi-legal status as ISA's in that they are supported through federal Follow-Through funds and have a relatively brief history within the state. Those 18 SERC Centers provide services, through 33 professional "area coordinators," in technical assistance in diagnosis and placement, in providing in-service training in special education, and in disseminating and collecting information related to special education.

The state also has 57 Joint Vocational Schools that serve as an arm of the SEA in providing local service in the area of vocational education. The SEA also operates an ERIC center.

The SEA is interested in R & D outcomes, and does include some lab products on its list of approved "adoption" projects. Yet, the feeling was expressed that much R & D information is simply not in a useful or useable form.

# TENNESSEE SEA

RX Contact Person

Chief, Adult, Community Education and Auxiliary Services

The Chief State School Officer in Tennessee is the Commissioner of Education. The Commissioner is appointed by the governor and, hence, his term of office is a coterminous foru years with opportunity for a succeeding term with the approval of the newly elected governor.

There are 147 local educational agencies, or school systems, in the state. These include 95 county school systems and 52 city, town, or special school systems. The state operates four special education schools (blind, deaf); eight correction schools; nine mental health special schools; twenty-eight vocational technical schools; and six comprehensive vocational education centers. There are also 102 approved private elementary and secondary schools.

In addition to the above, the state has nine development districts of the State Department of Education. Each of these geographically located districts have the responsibility to carry out instructional and supervisory services for a number of school systems within its region. In general, each district has a team leader and a staff of 35 to 40 specialists usually in the discipline or specific function areas. Some specialists serve more than one district, for example, one specialist serves each of the development districts as the "innovative programs" coordinator.

During the decade of ESEA, Title III, Tennessee had several sizable, multi-system projects. Project Mid-Tenn served 52 school districts in middle Tennessee. The state did not have a "state facilitator" nor did it establish any "developer/demonstration" programs.

Tennessee is currently in the process of developing a state-wide dissemination plan thorugh a Special Purpose Grant from NIE. The introduction of R & D resources into the local school systems will be handled through the nine development districts.

## WISCONSIN SEA

RX Contact Person

Supervisor, Information Retrieval Center, Department of Public Instruction

The Wisconsin Department of Public Instruction is organized into program divisions, each directed by an assistant superintendent. The state Superintendent of Public Instruction is elected by popular vote and serves a four-year term. The SEA serves 436 elementary and secondary school districts and 18 vocational districts across the state.

Nineteen Cooperative Education Service Agencies (CESAs) provide a variety of services to LEAs across the state. The nature of services provided depends largely on the needs of the LEAs in each geographic region. CESAs have no taxing power, or any direct relationship to the SEA. All LEA members of a CESA praticipate on a voluntary basis.

State planning efforts for dissemination activities were undertaken through a Special Purpose Grant from NIE. Responsibility for planning is within the Division of Management and Planning Services, the Bureau of Information Systems.

SEA staff have expressed an interest in becoming involved in the RX planning efforts.

## Local Education Agencies: Overview and Issues

### General Overview

a. Data on local school district selection and installation practices was collected in two ways. First, demographic information was collected on 152 school districts in the 12-state region. Project staff utilized directories and maps to choose these school districts on the basis of:

1. Geographical location within the state
2. Size of cities
3. Size of school districts
4. Accessibility to highway systems
5. Proximity to educational and governmental centers
6. Being in position to serve special purpose populations (ethnic, air force, and army installations, etc.)

These schools were listed on sheets (see Appendix for sample page) along with certain demographic data on each one. Through the use of state directories, the following information was compiled:

1. Name of school district
2. Population of city or community
3. Enrollment in the school district
4. Number of schools
5. Superintendent's name and telephone number

These data have been entered into a filing system for future planning and mailing purposes.

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The second level of data collection focused on the leadership, procedures, information sources, types of assistance and priorities of school districts in a sample drawn from the above school district pool.

The first step in securing a sample pool of school districts consisted of categorizing all 152 school districts into a two-way (6x6) matrix according to size of the community and school enrollment. When tabulation was completed it was found that twelve cells included at least one school district. These became the 12 groups of schools. In the sampling process the following criteria were used:

1. at least one in each group was selected;
2. at least one in each state was selected;
3. all cities over 500,000 were included;
4. previous contacts which would facilitate data collection.

This process resulted in a total of 30 schools. This seemed to be as many as could be managed through telephone interviews. It was later found that three of the districts in Group C could not be interviewed in time to be included in this report. One other school district was added in Group C making a total of 28 school districts from which data was obtained.

When the sample of school districts had been identified a letter was sent to each of the superintendents of schools describing the proposed project. The superintendent's office was then contacted by phone to determine a designated person to provide the data, and to provide school district demographic data. The designated person to provide data was then contacted and during a phone interview the data was secured.

## Overview of Findings

An analysis of the data indicate the following trends:

1. Leadership to Initiate Participation of School Staff in the Selection and Use of New Programs and Products. In the smaller rural schools it appears that superintendents play an active role in working with teachers and external agencies to select and use new products and programs. In middle-sized school districts having student enrollment of 5,000 or more students, curriculum and instructional directors and principals seemed to assume more responsibility than superintendents for selecting and using new products and programs. In some of the very large school districts, principals seemed to play very active roles in the selection and use of new programs and products. In other large city districts the roles of building principals, instructional directors, and assistant superintendents present a mixed and somewhat uncertain picture. It is suspected that these varied roles are due to different amounts of de-centralization occurring in the largest city schools.

2. Procedures used in Identifying, Selecting and Installing New Programs or Products. In nearly all instances school district personnel appeared to rely heavily on informal processes to become acquainted with promising programs and products. Discussions with friends at conventions and meetings who have similar staff level responsibilities seemed to be important means of identifying programs.

In many schools, school staff committees serve to examine program materials. In other instances, local district staff attend workshops and return to establish demonstration classes and/or train other teachers.

Trying out portions of a program as part of a committee evaluation process seemed to be another way of becoming acquainted with the program. It seemed that a trend was developing towards making judgments based on observations of actual classroom action rather than on printed descriptions. There appeared to be a trend at least in some areas towards adaptation rather than adoption of products and programs.

3. Information Utilized in Identifying, Selecting and Installing New Programs or Products. In nearly all cases, the existence of the NIE Catalogs was virtually unknown. In the few cases where the catalogs were known, there was no great effort to use them. There appeared to be general resistance to using resources that required extensive time and effort to read and understand. Information sources which were read frequently by local school district educators seemed to be only a few pages in length and covered topics in a simple and concise manner.

Immediate reactions of teachers and students to the use of new programs and products seemed to be highly valued among all groups as a means of making decisions on selecting products and programs. It appeared that lengthy technical reports were not very likely to be used.

4. Types of Assistance Utilized in Identifying, Selecting, and Installing New Programs or Products. State Education Agency personnel were viewed as important sources of assistance when funds were available to assist in installing the programs. Otherwise, there appeared to be a tendency for school districts to depend more on assistance within the school district than from external agencies. One major exception being small school

districts which lack time and local resources and must turn to external agencies. Except for State Education Agency personnel, personnel from local colleges seemed to be major sources of help to smaller school districts. Interestingly in some of the very large schools, community personnel are providing important assistance to local schools even on a non-paid basis.

5. Types of Assistance Needed But Not Presently Available. Almost all of the schools indicated that more funds were extremely necessary to select and install new programs and products. Since only about 30 percent of school districts responding to this item during the phone interview indicated any specific problems, it would be difficult to determine what help was needed. Some persons interviewed were either hesitant to admit their problems or shortcomings or did not recognize that they existed. It seemed that most everyone said they liked what they were doing. Follow-up assistance of an in-service type seemed to be the most common type of requested assistance. Better ways of informing the public was another request from a few school districts. It seemed reasonable to say that evaluation help did not represent a high priority of needed services.

6. Future Priorities Which Will Require Additional Programs or Products. The need for various vocational programs was often reported by small rural schools. Programs for gifted students, career education, individualized learning, health and special learning problems seemed to be the most commonly requested programs by schools, except the very large, in which basic skills remains a high priority.

7. Summary on the Use of Research and Development (R&D) Outcomes. During the inquiries among public school staff it was found that only about 25 percent of the school districts were using at least one program or product that could be classified as going through a complete R&D development cycle. The reasons seem to follow the logic that they are not likely to be used if they are not known about and understood. The incentives for using programs and products may not currently be sufficiently in place to encourage the public school staff to exert the extra effort, time and develop capabilities necessary to adequately carry out activities common to the R&D process.

8. Implications for Future Planning of the Exchange. The following are only examples:

a. Should the RX play a role in establishing local observation centers of classrooms using NIE products in action? If yes, what should this role be? How might this role be shared with other dissemination agencies?

b. Should the RX play a role in providing differentiated orientation and training to staff playing key roles in providing leadership to select and use NIE programs and products?

c. Should the RX play a role in making it possible for teachers and local staff members to attend more conferences, conventions and meetings where informal exchange of ideas can take place? If yes, what might this role be? How might it be related to roles of SEA's and ISA's?

d. Should the RX assume a role to help LEA's prepare better planning proposals? How can this role be related to the roles of SEA's and ISA's?

e. What should be the role of the RX encourage and help provide the availability of demonstration classrooms and NIE program information in rural area which are not easily accessible to travel and communication?

f. What should be the role of the RX to locate and encourage sources of assistance that reside outside the public schools?

g. Should teachers be represented on Regional Exchange Advisory Panels?

## DESCRIPTION OF INDIVIDUAL LEAS

## Description of Individual LEA's Grouped According to Community Population Size and Student Enrollment

| Group | Description | Community Population | Enrollment |
|---|---|---|---|
| (a) | Rural | <10,000 | <1,000 |
| (b) | | <10,000 | 1,000-5,000 |
| (c) | Rural Accessible* | 10,000-30,000 | 1,000-5,000 |
| (d) | | 10,000-30,000 | 5,000-15,000 |
| (e) | Small City | 30,000-50,000 | 1,000-5,000 |
| (f) | | 30,000-50,000 | 5,000-15,000 |
| (g) | Medium City | 50,000-100,000 | 5,000-15,000 |
| (h) | | 50,000-100,000 | 15,000-25,000 |
| (i) | Large City | 100,000-500,000 | 15,000-25,000 |
| (j) | | 100,000-500,000 | 25,000-100,000 |
| (k) | Urban City | >500,000 | 25,000-100,000 |
| (l) | | >500,000 | >100,000 |

*Accessible to major highway system, whereby rural school systems were not.

## GROUP A

| | |
|---|---|
| Population size: | 1-10,000 |
| Student enrollment: | 1-1,000 |
| Classification: | Rural |

### 1. School District a

Community population 1,013; nearly 100 per cent caucasian; not immediately accessible to major highway or population centers.

School enrollment: 417 students in three schools (one high school and two elementary schools). Superintendent plays active leadership role in selecting innovative programs; principals and teachers play active role in installing programs.

Contact person: Superintendent of schools who had noticed that NIE catalog was available but had not requested it. He would be willing to attend planning conferences.

School chosen for LEA description: enrollment 150 students; grades 9-12; no minorities; about 30 per cent on free lunch program; 19 teachers and one principal.

No NIE R&D programs installed during past two years. However, with help of State Department a local vocational educational program was put together from a variety of sources.

Missouri State Education Consultant, was most helpful in suggesting sources of programs and helped to design the building for Cooperative Occupational Education (COE) that combined industrial arts, home economics, automobile shop, and other areas.

Principals and teachers sent for materials recommended by State Education Consultant and made choices based on being able to offer a wide variety of choices to both boys and girls and was compatible with business capability in local area to cooperate. Facilities was no major factor as a new building was erected.

No incentive or rewards were offered except improved working conditions associated with being in a new building and having more contented kids in schools. Parents also gave more support to school because drop-out rate was reduced.

Recommendations from State Consultant who actually helped install program and design building and assistant commissioner who helped get funds for operation. First-hand information through personal contacts seemed important.

Other services needed are outside assistance to start a Career-Education program which combines values and basic skills and adds another dimension to the vocational programs. Superintendent commented that he wished the State Department could be as helpful in other instructional areas. He had noted card on availability of NIE catalog but had not acted.

## 2. School District b

Community population 2,200; is located on major highway system; few minority persons.

School enrollment: 915 students in two schools (Elementary K-6 and high school (grades 7-12). Superintendent and curriculum director provide leadership for investigating and selecting programs and arranging technical assistance. Teachers and counselors play important role in installing the programs.

Contact person: Superintendent of Schools who had no knowledge of NIE catalog; willing to send person to planning conferences.

School chosen for LEA description: Elementary school, 450 students, K-6; one black and ten to twelve Indian students, rest white caucasian; 25 per cent of students on free lunch program.

No R&D programs in use at present time. A consortium-based career education program (four high schools, two junior colleges, and a vocational technical school) is in planning stage. Testing program developed in California utilized in elementary school to identify needs and prescribe materials. Scarcity of computer programs of R&D type noted. No financial incentives provided: released time provided for participating staff to attend consortium meetings.

Information sources are mainly direct contact type with State Department Vocational Facilitator and personnel at local colleges. Superintendent feels local observation classrooms in which R&D programs are in operation would be important for helping district teachers choose programs. Program results with children considered important. Greater variety of programs would be helpful. Better means of communication important and need to stop "re-inventing the wheel" were mentioned by the curriculum director.

## 3. School District c

Community population 2,125; rural isolated; school enrollment 914; five schools

No school data collected at this time.

## GROUP B

Population size: 1-10,000
Student enrollment: 1,000-1,500
Classification: Rural

### 1. School District a

Community population 1,837; rural accessible.

School enrollment: 1,800; two schools, Elementary and High school

Superintendent offered to attend planning conference and would play active role in helping district choose and implement programs. He also served as contact person and provided information on local innovative practices. He knew nothing about NIE catalog.

The Elementary School was chosen for LEA description. Enrollment 900 students; K-6; no minorities; few persons on free lunch program; about 50 teachers and support staff.

Ginn Reading Program was being installed for all students grades 1-6; Title I consultant, State Board of Education catalyzed program adoption through helping with writing a proposal. Teachers, parents, and administrators examined materials, procedures, and means of assessment. Reading consultant in State Department very helpful. No extra pay or incentive provided to teachers except to "have something really worth teaching." First hand contacts and information helpful.

Superintendent mentioned there was too much paperwork in looking at possible programs. He wanted simple, easy to understand information. District had a high priority for special education due to State Department mandate for improving education in this area.

### 2. School District b*

Community population 1,034; suburban-type school; number of schools 10.

Director of Elementary Education plays key roles in choosing innovative programs. Superintendent had not seen any notice of the availability of NIE catalog. The director of elementary programs would likely represent the district at planning conferences and serve as local contact person.

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*This district is put into this category because of large enrollment from rural areas, as well as surrounding suburban areas although its school enrollment vastly exceeds others in this group. Thirty-one other school districts identified in this group; about equal numbers of rural isolated and rural accessible districts; information on community size, characteristics, number of schools and students enrolled and contact persons available in data management system for future reference and mailing list.

An elementary school was chosen by elementary director for LEA description. Enrollment 600 students, K-6; less than 5 per cent minorities with few students on free lunch program. There are 20 teachers and support staff.

A career education program (one of the Title III validated programs) was described. Several hundred students had completed the program. The developer of the program had provided help to local teachers to examine program and establish local implementations. Local needs assessment had been run with help of state education agency who furnished assessment results to local districts. Information seemed to be exchanged through personal contacts, rather than by printed materials. Program is too new to have many results. Initial training provided by Title III monies. No special incentives were provided to teachers in terms of financial rewards.

Packaged programs to help administrators become oriented to programs are needed. Informant suggested that commitment by local district personnel to use program packages properly was very important during first year. Local school district had been active in developing a reading program under Title III. It had been widely disseminated. School district has some leadership in career educational field that it would be willing to share with other school districts.

## GROUP C

| | |
|---|---|
| Community size: | 10,000-30,000 |
| School enrollment: | 1,000-5,000 |
| Classification: | Predominately rural accessible |

### 1. School District a

Community population 11,748; student enrollment 1,200; number of schools five

Superintendent designated director of Elementary Education as contact person. No knowledge of NIE catalogs was expressed. Superintendent indicated he would likely be attending any regional conferences on the Regional Exchange.

The installation of the Elementary Science Study (ESS) program in an elementary school eas described by the principal.

School enrollment 450 students; K-6; 20 per cent minorities and 35 per cent of children on free lunch program: There were 25 faculty members in the school which had been reorganized somewhat through the use of the I.G.E. (Individually Guided Education) program. Teachers were the principle sources of information who had heard about the Science program.

Some science materials of a periodical nature was used to better understand the program. The strategy used was to help enthusiastic teachers obtain the ESS "kits" and let them try them out in demonstration classes. Based on the results, other teachers elected to try out the program. No outside technical assistance was provided. No funds or assistance was provided by the state department. Positive student reactions were main basis for judging the program as being successful.

Materials being very expensive seemed to be main complaint. Other program (hoped for) assistance included a comprehensive physical education program, but there was a belief that if funds were available such materials could be developed locally. Some criticism was leveled at the State Education Department for not helping to continue the I.G.E. program on the basis that they could not continue to endorse a single product.

Fifteen other school districts in this category were identified. Pertinent information on characteristics and contact persons are on file for further reference.

## GROUP D

| | |
|---|---|
| Community size: | 10,000-30,000 |
| District enrollment: | 5,000-15,000 |
| Classification: | Rural accessible |

### 1. School District a

Community population 19,255; student enrollment 5,300 in 12 schools; few minorities.

Assistant superintendent for instruction served as contact. He had no knowledge of NIE catalogs. The school district wanted to be represented at the planning conferences.

The selection and use of the SWRL Reading Program in an Elementary School was described by the assistant superintendent. The State Facilitator of Title III was very helpful in getting the program started by helping to run a local needs assessment. The program materials were reviewed by teachers, community personnel, and students prior to their selection. Program results in terms of student outcomes considered a high priority for choosing program. A Phi Delta Kappan program was also used to assist in assessing needs. No financial incentives were provided for teachers. Follow-up consulting help was not sufficient and more funds were necessary for inservice help. Follow-up implementation is largely on an individual teacher basis.

Suggestions were provided to persons establishing Regional Information Exchange to indicate people must be more involved, with better communication and must think that they are getting something out of it. Future priorities for this district for programs seem somewhat unclear.

The school district was also utilizing an Early Prevention of School Failure program to help improve the school climate for learning. The director of (PEOTONE) program had been very helpful. Impact of both programs extended to about 300 students.

### 2. School District b

Community population 12,000; student enrollment 6,526 in nine schools (seven elementary, 1 junior high, and one senior high school).

Contacted superintendent and he reviewed general sources of getting information and means of choosing programs. He pointed out that the importance of administrative terms of principals as the principal linkers between teachers and superintendents in local schools over 1,000 students. He has not seen any notice of NIE catalogs and pointed out that Title III "Pace-Setter" magazines are being used as key types of information for district. He recommended a staff person in Curriculum Department to discuss school selection and use of innovative programs. He did say that a person would be available for planning conferences and the district would be willing to assume half the expenses.

A junior high school implementation of the Conceptually Oriented Mathematics Program (COMP) Title III validated program was described by a mathematics coordinator.

Student enrollment in school 1,133; Grades 7-8; few minorities; mostly middle class community.

Impact of program being determined on about 1,100 students at 7th and 8th grade levels. A facilitator of Title III program provided three input sessions to teachers which were considered helpful. Teachers and administrators examined the materials prior to trying them out in a few classes. Teachers were paid for summer orientation program. Local math coordinator continues to service program. Based on results more teachers are becoming involved in program. There is a need for more observation centers as first-hand information seems to play a key role in introducing teachers to program because they must believe it will work.

Other programs in the future which are needed by the school district include home economics and special education. Superintendent during interview states as a comment, "School district personnel are not likely to read anything of an information source more than three or four pages in length."

### 3. School District c

Community population 19,449; student enrollment 10,250; number of schools 15 (two senior high schools, three junior high schools, and ten elementary schools).

Superintendent's office was contacted and a referral was made to the director of curriculum. He reported that they had nothing to talk about with respect to innovation procedures because they had no monies to buy programs. Over 70 per cent of revenues come from national government as related to a local armed services installation and it is totally insufficient to carry out the job of providing any new and innovative programs. He also questioned another NIE initiative in this dissemination area as it seemed to be redundant with the facilitator role carried out by a state coordinator. However, when he learned that local people would have some say in what the information exchange would be, he indicated that he would like to attend the local conferences.

The director of curriculum placed extreme hesitation in discussing an innovative program in any one school. Rather, a curriculum model for entire school district was discussed which denotes an assessment, development, and implementation phase which is coordinated through elementary and secondary school councils with the help of the director of Planning and Development. For this reason, no school would be considered as typical and none are described. During 1977-78, language arts and health are priorities.

Fifteen other schools in this category were identified and their characteristics summarized for future references and mailing lists.

## GROUP E

Population size: 30,000-100,000
Student enrollment: 1,000-5,000
Classification: Small city

### 1. School District a

Community population 36,762; student enrollment 4,438; number of schools nine (one high school, one junior high school, and remainder elementary schools).

Instructional supervisor played a vital role in getting three innovative programs started during past two years. Superintendent reported that NIE catalog had not been requested to his knowledge. He would like to have district represented in the planning effort.

The local high school in implementing the School-Within-A-School Program was described as a typical school in the district change process.

Enrollment 1,375; grades 9-12; approximately 20 per cent blacks, 4 per cent orientals, and 10 per cent having diverse Asiatic and African backgrounds. Faculty included 73 teachers, administrators, and other staff members.

A Regional Training Center provided a vital role in getting information to a five-person local team consisting of deputy superintendent, director of Counseling, Career Education Counselor, Special Needs Counselor, and Instructional Supervisor. The program was implemented gradually as it demonstrated capability to meet needs established through a pre-assessment process. The program has had impact on all students. No particular rewards offered to teachers. The Training Center provided valuable assistance in supporting program during the installation phase. Staff from the Center took charge of the school for a period and modeled desired change behaviors.

Main problem has been interpretation of program to local community. No solution has yet been found and no programs were known to effectively overcome this problem. Future priorities include an emphasis on helping students make decisions on careers. A computer-assisted program is being implemented to aid in this problem.

Informant suggests that school district needs rapid turn-around of information presented in a simple, direct fashion.

## GROUP F

| | |
|---|---|
| Community population: | 30,000-50,000 |
| Student enrollment: | 5,000-15,000 |
| Classification: | Small city |

### 1. School District a

Community population 45,288; school population 9,635; number of schools 14.

Contact person was curriculum director who had some knowledge of NIE catalog. He would like very much to have one or more persons involved in regional planning.

A senior high school was selected for descriptive study. Enrollment 1,400; organization Grades 11 and 12; student body very heterogeneous; 4-5 per cent blacks; no other minorities; 10 per cent or less on free lunch programs; faculty 85.

School has served to develop four programs under Title IV which have been transported to other classrooms within the district and within the region. Learning styles of students heavily considered during development process. Consumer activities include the "PIPs" modules being utilized. Printed materials and brochures utilized in disseminating information to staff. Key local university personnel of considerable value in this effort. Attention was focused on Education by Choice which had had impact on 700 students within school.

District instrumental in setting up and conducting education conferences which have served to exchange information among local educators. Information on new programs seemed adequate with informal contacts at conferences and meetings very valuable. Problems in installing programs largely taken care of by internal task forces.

Considerable amount of ESEA monies used in school district to develop teacher skills which has proved to be a valuable incentive to participate in both developing and installing innovative programs.

Future priorities include expansion of at least three other programs within school and district--program individualized instruction, project renewals, and career centers project.

### 2. School District b

Community population 46,859; serves a high per cent of university personnel; school enrollment 9,000 in 21 schools.

Director of curriculum and instruction serves as contact person. Little or no knowledge of available NIE catalog provided. School district very anxious to have someone represent school district in planning sessions. Concern was expressed over low quality of some validated Title IV products. Curriculum director expressed willingness to help take special initiative to improve these programs.

A senior high school was selected by curriculum director for LEA description. School principal provided the data. Enrollment 1,000 students; organization Grades 10-12; composition of student body 3 per cent minorities, rest white. Parents in area represent a mixture of very mobile and/or strongly vested interested interest groups. No strict research and development programs were being utilized. Description of school decision-making processes were based on Paced Chemistry and Physics, developed at a university probably with Title III funds. Two teachers and 90 students were involved in chemistry program and one teacher and six students were involved in paced chemistry program.

Sources of innovation principally consisted of two teachers attending science workshops on university campus, returning to school district and trying out some ideas. Entire program was not adopted until one year later.

Persons working together to choose program were principal, three teachers and K-12 science coordinator. Interest of teachers was principal basis for choosing program.

Principal reports major incentive to be "inner satisfaction."

No other help was instrumental in helping select and/or use program than the university professors. No one from any agency provided any follow-up assistance or collected any feedback information.

They need programs for the gifted students at all levels.

Program didn't seem to meet all students needs; modifications were made to allow 50 per cent of students to enter paced programs and 50 per cent to enter traditional programs.

They have need for programs for gifted; there is a lack of programs in this area.

Overall comments include a belief that a high priority should be based on internally-developed programs in which teachers play a major role in deciding the input.

### 3. School District c

Community population 46,309; suburban area located in or near large urban-metropolitan area; school enrollment 7,027.

Superintendent identified the curriculum supervisor as a contact and resource person, but offered to take initiative to actively participate in regional planning along with other selected staff members. Availability of NIE catalog was unknown to the superintendent.

The installation of the Comprehensive School Mathematics Program at an elementary school served as a description of the decision-making process in innovative programs at the LEA level.

The school enrollment is 535 in grades K-5; 60 per cent of students are black, 18 per cent represent other minorities.

The present activity at this school represents a mixture of field testing as well as installation activities. However the program is being disseminated to other teachers who are in the process of using it. The main catalyst for becoming acquainted with the program was an elementary resource teacher, who learned about it through printed materials and discussions with other teachers.

Inservice training and materials have been lavishly provided to the school and few problems within the program have occurred. Assistance to select and operate the program have been provided by CEMREL, Inc., a local research and development laboratory. One significant problem has been that parents don't understand the program. Some students and teachers haven't been able to completely adjust to the shifting of attitudes necessary to be successful in this type of program. However, overall reaction to the program has been very favorable.

## GROUP G

| | |
|---|---|
| Community population: | 50,000-100,000 |
| School enrollment: | 5,000-15,000 |
| Classification: | Middle city |

### 1. School District a

Community population 62,309; student enrollment 5,000 in 16 schools; district serves small university and two local colleges; local economy heavily tied to agriculture.

Superintendent identified a director of elementary education as a contact person who indicated no knowledge of existing NIE catalogs. The availability of anyone to represent school district at planning conferences depended on travel schedules of directors of elementary and secondary education.

A Human Development program being installed at an elementary school was described. This school represents 15 other schools in which the process of making decisions on selecting and using programs is very similar.

Enrollment 600; K-6; less than 1 per cent minorities; 30 faculty members. All students in the school are impacted by the program. Guidance coordinator was a person primarily responsible for getting program started. Based on information from other teachers and program director in San Diego, California. The guidance coordinator attended a workshop in California. A follow-up workshop was conducted among teachers in all schools. Teachers were given professional growth credits. The developer provided some follow-up assistance. Guidance coordinator now serves as consultant to other districts. No problems were reported for selecting and using the program. A stipulation was made that everyone installing program must have 18 hours of training.

Future priorities include more programs and workshops to change attitudes (affective) and to improve logical thinking skills. Additional comments indicated school district had a high priority for doing everything within the district on local funds.

### 2. School District b

Community population 50,329; school enrollment 7,047 in 14 schools.

Superintendent selected the coordinator of Special Services as person very knowledgeable about research and development usage in the district. Superintendent did not know of the availability of the NIE catalog. He had taken initiative to learn about requests for field-test sites for programs in which the district had an interest. It was through district cooperation in field-test operations that the school district becomes involved in innovative programs. Superintendent hoped the district would be represented at the planning sessions.

The high school was chosen by superintendent to be described in terms of program selection and usage.

Enrollment about 1,000; grades 11-12 as part of 9-12 complex; about 12 per cent of school enrollment represents minorities; slightly less than half of students are on free or assisted lunch program.

The school has implemented the Exploring Childhood program developed by Educational Development Center. The program is used by one teacher and 50 students.

Periodicals from the developer were used by the superintendent to learn about proposed field tests. One teacher participated in field test of the Exploring Childhood program and has continued to implement the program. Initial training for the teacher was provided at an EDC regional workshop. Teacher seems very satisfied with program and acts as a means of disseminating information to others. Reactions of students and teachers seem to be main basis for choosing program. Through this interest other programs including projects for self study and severely handicapped youngsters have been initiated. The State Department of Education has helped to provide some funds to get programs for handicapped students started as the school district is near institutions which serve these purposes. Special transportation has proved to be a technical problem in installing program. No other problems were reported. Future priorities seem to lie in this area.

One other school district in this category has been identified. Major characteristics described including contact person. This information has been entered into the data management system for future reference.

## GROUP H

Community population: 50,000-100,000
School enrollment: 15,000-25,000
Classification: Middle city

### 1. School District a

Community population 85,000; school enrollment 22,767; number of schools 39.

Superintendent when contacted asked for additional time to study proposed effort as described in LEA letter. He asked for additional information and stated that names of contact persons would be submitted along with school district information at a later time. When this information is received, it will be entered into the data files and management system for future planning and mailing purposes. General data on eight other school districts in this category will also be entered into this system.

## GROUP I

Community population: 100,000-500,000
School enrollment: 15,000-25,000
Classification: Large city

### 1. School District a

Community population 125,011 represents an important political and government center within the region; school enrollment 19,840 in 43 schools plus several special purpose schools.

Assistant superintendent acted as contact person and informant for CEMREL/McREL RX project. He had no knowledge of NIE catalog being available or used in the district. He was anxious that school district be represented at regional planning sessions.

An Outdoor Education Program (Title III program) being implemented at an elementary school served as a focus of discussion on the district's use of innovative programs. No R&D programs are currently in use in the district.

Enrollment of school 300 in K-6 Title I school having 18.6 per cent minority students; a fairly high number of students are on free lunch program; the staff consisted of 20 teachers, counselors, and one principal.

The Outdoor Program was developed within the district and spread in use throughout the district and is used in all elementary schools.

Title III facilitator catalyzed the program through a proposal. First-hand information seemed to play a major role.

Interested teachers and principal worked together in developing proposal and have acted as dissemination agents to other teachers. Teacher interest is the main basis for participation.

No additional incentives reported.

He reported that State Department has been of occasional help.

No additional information is needed; too much information to go through to make choices in many cases has been a real important problem.

Future priorities include a re-examination of reading program, development of middle school program, and career education programs.

He mentioned that sources of information exist for all of these programs. First-hand information to be preferred.

Overall comments included a strong reiteration of often too much information and a hope to become involved in future planning.

General characteristics for four other sources in this group have been identified and will be entered into the data management system.

## GROUP J

Community population: 100,000-500,000
School enrollment: 25,000-100,000
Classification: Large city

### 1. School District a

Community population 168,213; heavily industrialized area located adjacent to a large urben industrialized city; school district enrollment 28,871 students in 65 schools.

School district has yet to identify a contact person for future planning purposes. The director of Elementary Education provided data on innovative program selection and usage in an elementary school. Availability of NIE catalog not known.

Enrollment of selected school 498 students in K-6 organization with a small per cent of minorities; faculty consists of 19 faculty members.

The process of selecting and using the Addison Wesley Science materials (including kits) was described. Approximately 435 students and teachers are currently involved. Based on publisher's information and discussions with members of local science education associations, several science programs were examined by representatives from 40 schools serving as an evaluation committee. The materials are tried out as part of the evaluation process. Student and teacher reactions are main basis for choosing the program. The publisher sent representatives to conduct workshops for initial inservice training. High school teachers in the district have served as resource teachers and consultants. No contact with State Education Department reported. Program is financed primarily with local funds. Teachers were not provided with extra financial incentives.

It was reported that additional inservice training throughout the training would be helpful. Program is currently viewed as moving along in satisfactory manner. New future thrusts include high priorities in English and Spelling in 1977-78.

Informant suggested that reading and mathematics councils hold state and national workshops which would be important means of disseminating ideas and practices. This person indicated that state departments were contacted when information was needed. However, cross work with state department might interfere with other approaches the district might wish to take. Thereofre, the district didn't want to be put in the position of having an obligation to the state department.

## 2. School District b

Community population 300,000; serves an important governmental function in the state and regional area; school population 45,989 in 79 schools.

Director of Curriculum serves as contact person and did not know about the availability of the NIE catalog. The district would like to be represented at regional meetings. This person mentioned that district was rather decentralized with much variance among schools as to programs selected and used. For that reason, it wouldn't be possible to pick a representative or typical school.

Rather, it seemed more logical to talk about a representative innovative program used in all of the schools. The Elementary Science Study (ESS) program was nominated to provide a description of how programs are selected and installed in the district. For census purposes, 49 elementary schools are located in the district. Nine schools have 100 to 200 students; 40 schools have 800 to 900 students; all schools are K-6 in terms of organizational structure; approximately 15 per cent of student enrollment in the district are Spanish, Orientals, Native Americans, or Blacks; the ratio of faculty to students is about 30 to 1.

The representative program (ESS) was developed at Educational Development Company (EDC) located at Cambridge, Massachusetts. The initial enthusiasm for the program was generated among school staff by the school district science supervisor and a state education facilitator who helped school district develop a Title IVC proposal for inservice support. A large committee of teachers examined the program and tried out portions in selected classrooms for 1.5 years. Final decision on program choice rested with them.

Positive teacher reactions and the way students responded led to a complete implementation program in all schools. Initial inservice training was provided for 800 to 1,000 teachers by personnel at a local university. Summer stipends were provided through the IVC grant for workshop training. Problem expressed was that someone was needed to give backup support and help. Successful teachers being released from classes to help other teachers was a real possibility if funds were available. District was happy with the ESS program. All comments seem to point to the classroom teacher being a key dissemination person.

## 3. School District c

Community in which this school district is located is unincorporated. It represents a suburban area in a large metropolitan urban-suburban complex. The size of the student enrollment (42,000) makes it a likely candidate to be included in this group of schools.

The director of Planning and Research was contacted and this person indicated the future goals and priorities of the school district to be the establishment of an overall planning and management system. The NIE catalogs had not been seen in the administration office. There was considerable enthusiasm expressed for an opportunity to participate in regional planning.

A senior high school within the school district was designated to provide data on processes used to select and use innovative programs. The principal in the senior high school provided the following necessary information.

Enrollment 1,972 students in Grades 10, 11, and 12; only about 1 per cent of students represent minorities; the school staff of 88 includes teachers, guidance counselors, and administrators.

The only program presently utilized in the school that is considered a research and development program is the Inquiry-Role Approach developed at the Mid-Continent Regional Educational Laboratory, Kansas City, Missouri. Some 300 students of three teachers are involved in the program. A biology teacher who participated in the field test of the program was principally responsible for installing the program in the Biology Department. Based on the teachers and students reactions, other teachers elected to utilize the program as a whole or in part. One teacher was reassigned to another school building and introduced the program to those teachers and students. No extra financial rewards were provided for teachers to participate in the program.

Outside assistance was provided by McREL during the field-test phase. The biology teacher continued to provide orientation and help to other teachers following the field-test phase. State department help was not utilized in the installation of the program. The program, while viewed as successful does not meet all of the individual needs of the students and other individualized programs are sought at the present time.

## 4. School District d

Community population 149,518; an important governmental and educational area to surrounding region; school district enrollment 29,619.

Superintendent did not know about the availability of the NIE catalog. He identified a director of Industrial Arts Educator as one of several persons who understood the process of installing innovative programs in the schools. The superintendent indicated a willingness to send someone to the planning conference if the school district was selected.

The World of Construction and World of Manufacturing, developed at The Ohio State University, was discussed as an innovative program installed at a local junior high school.

Enrollment of the school 1,000 students in a 7-9 organizational structure; students represent upper middle class families; minority backgrounds are not common; about 370 students in 8th and 9th grade level are presently involved in the program.

Information on the program was largely obtained at professional conferences. The principal, a consultant, and several teachers formed a team to secure information, evaluate the program materials, and commit themselves to trying out the program on a limited basis. The teachers needed to be convinced the program would work in their school.

The reactions of junior high school students to the program provided an important basis for further considering the program. All monies for installing the program were derived from local sources. The State Department of Education played no role in choosing or assisting in its use. The informant suggested that a lack of initial information was a problem as there are few programs available in this area. No special incentives were provided for teachers except to improve their teaching.

An important dissemination practice was to select one teacher or consultant to go receive training and return and provide it for others. Another desired dissemination practice was for the program to be used effectively as intended by developers in a few schools and the ideas will spread. No changes to necessitate new programs expected in the near future.

Above described program represents only one of some 40 innovative programs in the school district.

### 5. School District e

Community population 447,877; represents a central hub of governmental and educational activity within the state; school district enrollment is 83,480 in 136 schools.

Director of Department of Research and Evaluation is designated as contact person and to help provide information for this report. The availability of the NIE report was not known in the school district.

The superintendent designated the director of Research and Development to attend the planning conferences.

The informant suggested that the district was decentralized into three districts. There are elementary and secondary specialists in each of the districts. Also, subject matter specialists assigned to serve the entire district have their offices in central administration building.

The Carter Lawrence (Middle School) was chosen by the informant as descriptive of the selection and installing strategies used in the district. Enrollment of the school is 400 students; 30 per cent represent minorities; about 40 faculty members are assigned directly or indirectly to the school.

The program selection procedures focused on the Individualized Reading Centers, oral and written communication program. This program was developed in Nashville with the help of ESAA funds. The program was later disseminated to non-ESAA schools. The ESAA coordinator seemed to catalyze the program by helping the director of Elementary Education and teacher staff to write a competitive-type proposal which included a developmental plan. Funds were made available for materials and inservice training during developmental phase.

During the dissemination and diffusion phase, the school district is expected to bear none of the installation expense. In addition to above incentives for teachers, additional aides were provided to assist the teachers in the classroom. Positive reactions of teachers and students were main criteria for expanding the program to more teachers and students. No real problems involved in the program use and future priorities for programs seem unclear at this time.

Data on general characteristics of 16 other school districts in this group have been collected and entered into the data management system for purpose of future reference.

## GROUP K

| | |
|---|---|
| Community population: | 100,000-500,000 |
| School enrollment: | 25,000-100,000 |
| Classification: | Large urban cities |

### 1. School District a

Community population 622,236; school enrollment 83,000 in 151 schools.

Superintendent designated an assistant superintendent of Instructional Support Services to serve as a contact person and informant. Informant reports that NIE catalog is not available in the administration building for use in selecting programs. There was an interest in sending a representative to the December meeting in St. Louis as well as the regional meetings.

The IGE (Individually Guided Education) program was being implemented in one elementary school having an enrollment of 350 students in multi-age levels 6 through 14. The student body consists of 52 per cent black and 48 per cent white students. Thirteen faculty members are assigned to the school.

The initiative to install the IGE program was in the form of a directive from the central office administration.

A workshop was held in August 1976 with teachers, two parents, and the principal. The Wisconsin Research and Development Center provided leadership in the workshop. The installation of the IGE program was partially financed by Title VII funds. Teachers were not paid to take the inservice training. Teacher and student reactions seem to be main criteria for assuming the program is succeeding.

Outside assistance was provided by a local university facilitator. While this is the first of three years for the IGE project, considerable progress is reported to have been made. No additional services seem to have been necessary and future requirements for other programs seem unclear.

### 2. School District b

Community population 507,000; district enrollment 51,000 students in 91 regular schools in addition to several specialized schools.

Superintendent has designated an assistant superintendent to serve as a contact person. There was a willingness expressed by the informant for the district to consider sending someone to the planning conferences.

The director of Research was assigned the task of helping to supply the data on the selection and usage practices in a local school. An elementary school was selected which has established a Title I reading, language, and mathematics program. Guidelines were established by Title I, State Department of Education. Two hundred forty children are participating in the program--50 in reading, 60 in language, and 130 in math. About five teachers were involved to help decide the content of the program.

The basis for selecting programs in Title I are determined by guidelines provided by a coordinator in State of Missouri Department of Education.

The materials and books used are selected by local board of education with input from key subject-matter specialists.

Only reading teachers receive external rewards which is $30 per month.

Agencies providing help are publishers of texts and representatives from local universities who provide special help in workshops. The latter reading center representatives were considered very helpful.

Preference would be to provide more classroom help rather than treating only remedial cases.

A major problem consists of the student spending too much time outside classroom. These problems do not seem to be communicated to the board.

No particularly new initiatives or priorities were stated. Rather, it seemed that effort would be expended to expand the present Title I program.

## GROUP L

| | |
|---|---|
| Community population: | Over 500,000 |
| School enrollment: | 100,000-500,000 |
| Classification: | Large urban city |

### 1. School District a

Community population 3,640,000; school district enrollment 521,653 in 622 schools.

Superintendent did not know about the availability of the NIE catalog. The administrative structure of the district was explained in terms of 27 school districts which varied somewhat in the priorities, programs selected and used. The superintendent offered to make someone in the school district available to attend the planning sessions. The USMUS program was suggested by the superintendent as being a representative innovative program reflecting the district's philosophy on selection and usage of research and development outcomes.

Throughout the district, the program is scheduled to be used in 120 schools and eventually to spread to other schools. Two representative schools were suggested for descriptive consideration.

The school contacted was a K-8 elementary school having 514 students. The student population consisted of 43 per cent white, 47 per cent black, and 10 per cent oriental students. About 40 faculty members are directly or part-time assigned to the school.

USMUS for Elementary Students was developed by Educational Development Center, Newton, Massachusetts. Approximately 200 students are involved with the program during the past two years. A local laboratory school professor suggested that the USMUS program be considered for the school district. Improved competency in problem-solving techniques was an established need for the district.

A teacher and principal team attended a two wook workshop at a university to become oriented to the program. Some of these teachers returned to Chicago and conducted a workshop for 100 other teachers. Teachers attending the workshop were given a pay increment on salary schedule. Released time was also provided for some workshop sessions. Two teachers have become consultants for EDC. Valuable outside assistance has consisted of parents who have been contacted and scheduled to help by becoming room-mothers. EDC sends follow-up consultants to the schools and several hundred teachers have been oriented to the program.

An important problem arose when the district tried to convice teachers first and administrators second. The process was reversed this year with more favorable results.

Other programs being needed to meet future priorities pertain to bilingual education. There is apparently a scarcity of programs in this area.

First-hand information seems to work better than printed materials. Principal of school advises that when program shows promise of widespread diffusion, a presentation should be made to the community. The State Department had little or no role in disseminating the program.

## 2. School District b

Community population 1,511,432; student enrollment 272,542 in 347 schools.

Superintendent named director of Research Division as contact person. The availability of NIE catalog was not known. This person explained that very few externally developed package programs are installed in the schools because of the philosophy of many educators that best change process comes from within the system. A lot more adapting than adopting occurs within the schools. Strong efforts are being made to involve staff, communities, and students.

While it is unlikely there is a typical or represenative school, the Region 7 Middle School was selected as the school to be described. Enrollment 460 students in grades 5-8; 50 per cent of students are black, 48 per cent are white, and 2 per cent represent other minorities; about 23 faculty are assigned full time to the school.

The program being focused upon provides for mini-courses being developed which heavily emphasize sutdent participation in school. This program was being developed within the school to meet the unique demands of a middle school. Ideas developed seemed to originate among teachers. No external information source was mentioned.

The school principal seemed to be the main catalyst to move the program from the developing teachers to other teachers within and outside the building. No state department funds are expended in the project and teachers receive no special compensation except to increase the learning alternatives for students. Most of the assistance was provided within the district with occasional consultants coming in from colleges and universities.

Problems usually consisted of cutbacks because of lack of funds. No new programs are anticipated at this time.

There was interest in the school district being represented at the planning conference.

## 3. School District c

Community population 750,903; student enrollment 123,000 students in 180 schools.

Superintendent indicated that noone in the administration knew very much about the NIE catalog. There was much interest in the RIE project and an instructional supervisor was selected by the superintendent to provide information on their selection and dissemination processes. The instructional supervisor indicated a strong desire to participate in the planning conferences.

John Marshall Senior High School was named as the school to be described in this report. Enrollment in this school is 2,300 students in grades 10-12. The student body consists of 57.5 per cent blacks and 2.1 per cent of other minorities. One hundred eighteen staff members are assigned to this school.

The program focused upon is the Conceptual Thematic Planning in Social Studies Program. It was developed within the district and disseminated within the district. Some 4,600 students have been involved in the program (some more than once). The program was initiated by the Social Studies Education director who was trained in the innovative Social Studies Program who returned and trained head teachers of the Social Studies Department. These department heads in turn trained other teachers in their departments. Within three years every Social Studies teacher in the school had received training.

During the original training, each teacher was given $7.50 an hour to participate from funds from a special grant. Now, no funds are provided for training.

Outside assistance was provided early in the program by two consultants. No particular problems or special assistance is necessary. Priorities include expanding this training program into English, followed by Science.

The State Department seemed not to play a definite role in the dissemination program. Student results seemed to play an important part in making decisions on program success.

## 4. School District d

Community population 623,530; student enrollment 120,000 in 167 schools.

Superintendent did not realize that the NIE catalog was available. The director of Elementary Education was designated by the superintendent to provide information for this report. Superintendent was willing to make someone available for regional planning.

An elementary school was selected by the director of Elementary Education to represent district program selection and usage strategies. The enrollment of the school is 450 students at grades 4-6. The student body consists of 60 per cent blacks, 30 per cent whites, and 10 per cent of other minorities. The program focused on was the Aesthetic Education Program developed at CEMREL, Inc., St. Louis, Missouri. Approximately 150 students in grades 4-6 and five teachers are involved in the program.

An area specialist in the school district became interested in the program both through personal contacts with laboratory personnel and printed materials. A committee of staff members in the school decided to select the program based on results from pilot programs in a few schools in the district. No extra pay was given to teachers participating in the program. An arrangement was made with a local Junior League which consists of a national organization of housewives who help in the classroom. The program was financed entirely by local funds.

A local university provides some classroom assistance. Area specialist continues to provide classroom assistance aided by two other teachers who have become principal disseminators.

Funding the programs has been only major problem. Other priorities include getting help in the kindergarten area. Three programs are known to exist which are to be given further examination.

### 5. School District e

Community population 371,472; student enrollment 117,000 in 162 schools. (Note: this school was placed in this category on the basis of its student enrollment only.)

No evidence provided that staff knew about the NIE catalog. There was interest in participating in the planning conferences.

Curriculum director provided some data on a local innovative procedure as no research and development programs were selected and installed in the district. Two thousand twenty-four students attended the high school having grade levels 7-12. About 15 per cent of students are minorities and about 25 per cent are on assisted lunch programs. About 120 faculty members are assigned to this school.

The innovative technique consisted of a time-out room being established at the high school where students may go at times when they would normally go to a class in which they have had trouble with a teacher.

Consultants in Florida provided assistance to getting idea into operation. The school was very interested in idea because if students could be kept in school the average daily attendance would be higher and would mean more funds for the district.

There has not been any financial support for the program from external sources. Future priorities include providing more options for students. One caution provided by informant was that sometimes external agents subtly bring in programs which tend to raise local taxes to pay for them.

General descriptive data were collected on Columbus, Ohio, Minneapolis, Minnesota, and Milwaukee, Wisconsin. This information was entered into the data management file.

## Other Dissemination Agencies: Overview and Issues

### Description of Other Dissemination Agencies

A variety of dissemination activities are engaged in by other agencies across the CEMREL/McREL service region. In most cases, these activities interact with and are related to activities ongoing through SEA's, ISA's, and LEA's in the region. They play an important role in the dissemination network in the 12-state region. General purpose activities include those engaged in through the National Dissemination Network and the National Dissemination Leadership Project. Special activities include: Title I activities; PIP diffusion; Aesthetic Education Learning Centers (AELC's); the Bilingual Education Service Center; the National Learning Disabilities Project; and the Minnesota Public Schools/University of Minnesota Teacher Center. NIE School Practice and Service Grant related activities are ongoing in six of the twelve states in the service region. Centralized sources of educational information include the ERIC Clearinghouses and educational libraries within each state. Major teacher training institutions across the region, in most cases, tend to be centers of activity.

For immediate planning purposes, descriptions of specific activities were developed for three agencies not generally falling within the SEA, ISA, or LEA catagories. They include a state facilitator project, a state education association, and a PIP diffusion contractor. In addition to descriptions of specific activities, the analyses include perceptions of major dissemination issues and reactions to Regional Exchange planning efforts.

Dissemination related activities engaged in by agencies other than SEA's, ISA's, and LEA's have major implications for Regional Exchange planning.

Some of the activities currently interact with activities of state and local agencies in an informal if not formal manner. As RX planning will capitalize on the use of existing networks and relationships, both formal and informal, it is crucial for RX planners: to become informed and knowledgeable about the activities engaged in by these agencies; to include key individuals from these agencies in the planning process; and to plan for cooperative exchanges among RX staff and staff of other agencies during the operational phase.

### General Purpose Activities

Major general purpose activities include those engaged in by the National Diffusion Network and the National Dissemination Leadership Project.

### The National Diffusion Network (NDN)

> "The National Diffusion Network is a delivery system designed to disseminate information and provide technical assistance to local school systems and public

> and private elementary and secondary schools in order that they may adopt exemplary elementary and secondary education programs, products, and practices approved for dissemination by the Joint Dissemination Review Panel (JDRP) of the Education Division of the Department of Health, Education, and Welfare. The JDRP serves as a quality control mechanism with respect to educational programs, products, and practices proposed for dissemination by officers or employees of the Education Division. In the course of carrying out their program responsibilities, these officers or employees identify programs, developed with Federal funds, which they believe to be sufficiently exemplary to be disseminated in order that they may be replicated or otherwise used in other settings. The JDRP reviews these and approves for dissemination by agencies of the Education Division those programs for which there is adequate evidence that they have been effective.
>
> "These JDRP approved programs which are at the elementary and/or secondary levels make up the pool of exemplary programs, products, or practices disseminated by the National Diffusion Network for widespread installation in local school districts and in nonprofit private schools."*

The NDN approach includes two strategies: Developer/Demonstrator Projects and State Facilitator Projects. The projects in the CEMREL/McREL service region are listed below.

| State Facilitators | Developer/Demonstrator Projects |
|---|---|
| Illinois | |
| Carol Reisinger<br>Meridian Community Unit #101<br>Mounds, Illinois | Positive Attitude Toward Learning<br>Bethalto Community Unit #8<br>Bethalto, Illinois |
| | Early Prevention of School Failure<br>Peotone, Illinois |

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*Federal Register, Vol. 41, No. 202, October 18, 1976

| State Facilitators - | Developer/Demonstrator Projects |
|---|---|
| Indiana | |
| John S. Hand<br>Logansport Community School Corporation<br>Logansport, Indiana | SDR: Systems Directed Reading<br>Baugo Community Schools<br>Elkhart, Indiana |
| Iowa | |
| Glenn Clarkston<br>Bellevue Public Schools<br>Bellevue, Nebraska | Media Now<br>Southwest Iowa Learning Resources Center<br>Red Oak, Iowa |
| | Home Start: Family-Centered Preschool Enrichment<br>Waterloo Community School District<br>Waterloo, Iowa |
| Kansas | |
| Steve McClure<br>Turner Unified School District<br>Kansas City, Kansas | |
| Kentucky | |
| Lawrence W. Allen<br>State Department of Education<br>Frankfort, Kentucky | RE-ED School<br>Louisville, Kentucky |
| Michigan | |
| Dr. Clare Keller<br>Project INFORM<br>Westland, Michigan | Parent Readiness Education Project (PREP)<br>Redford Union School District<br>Detroit, Michigan |
| | Vocational Reading Project<br>Oakland Schools<br>Pontiac, Michigan |

| State Facilitators | Developer/Demonstrator Projects |
|---|---|
| Michigan (continued) | Contract Learning for Educable Mentally Retarded Students<br>Grand Rapids Public Schools<br>Grand Rapids, Michigan<br><br>Project FAST<br>Essexville-Hampton Public Schools<br>Essexville, Michigan |
| Minnesota<br><br>Richard T. Hegre<br>Independent School District #793<br>Staples, Minnesota<br><br>Diane Lassman<br>Minneapolis Public Schools<br>Minneapolis, Minnesota<br><br>Richard Peterson<br>SW and W Central Educational Service Area<br>Marshall, Minnesota | Project FOCUS<br>Roseville, Minnesota<br><br>St. Paul Open School<br>St. Paul, Minnesota<br><br>Family Oriented Structured Preschool Activity Personalized<br>Seton Hall Preschool<br>St. Cloud, Minnesota<br><br>Project SHARE<br>Crookston, Minnesota<br><br>Demonstration Evaluation Center<br>Hopkins School<br>Hopkins, Minnesota<br><br>Urban Arts Program<br>Educational Testing Service<br>Minneapolis, Minnesota |
| Missouri<br><br>Jolene Schultz<br>Columbia Public Schools<br>Columbia, Missouri | Saturday School: Parent-Child Early Education Program<br>Ferguson Reorganized School District<br>Ferguson, Missouri<br><br>Conceptually Oriented Mathematics Program<br>Columbia, Missouri |

| State Facilitators | Developer/Demonstrator Projects |
|---|---|
| Nebraska<br>Glenn Clarkston<br>Bellevue Public Schools<br>Bellevue, Nebraska | Engineered Classroom for Students Who Are Both Educably Mentally Handicapped and Behaviorally Maladjusted<br>Papillion-LaVista Public Schools<br>Papillion, Nebraska<br>Project Success for the SLD Child<br>West Elementary School<br>Wayne, Nebraska<br>Project INSTRUCT<br>Lincoln Public Schools<br>Lincoln, Nebraska |
| Ohio<br>Jack L. Lewis<br>State Department of Education<br>Columbus, Ohio | Curriculum for Meeting Modern Problems<br>Lakewood Board of Education<br>Lakewood, Ohio |
| Tennessee<br>None | None |
| Wisconsin<br>Russell S. Way<br>Wisconsin Center for Innovative Programs<br>McFarland, Wisconsin | Strategies in Early Childhood Education<br>CESA #13<br>Waupun, Wisconsin<br>Project I-C-E<br>Green Bay, Wisconsin<br>DRUG Prevention Education<br>CESA #8<br>Appleton, Wisconsin |

The National Dissemination Leadership Project (NDLP) has as its goal the enhancement of the development and implementation of disseminated programs at both federal and state levels. A description of the objectives of the projects and a list of NDLP dissemination representatives in the CEMREL/McREL service region follow.

## Special Purpose Activities

Major special purpose activities include: Title I activities; PIP diffusion; Aesthetic Education Learning Centers (AELC's); the Bilingual Education Service Center; the National Learning Disabilities Project; and the Minnesota Public Schools/University of Minnesota Teacher Center.

Title I Activities include those engaged in by ESEA Title I State Coordinators and those conducted through exemplary Title I projects. Lists of state coordinators and exemplary projects in the CEMREL/McREL service region follow.

## NATIONAL DISSEMINATION LEADERSHIP PROJECT

### Goal

To enhance the development and implementation of dissemination programs at the federal and state levels.

### Objectives

1. To provide administrative support for the operation of the national steering committee established to provide leadership and policy guidance for the National Dissemination Leadership Project and its component activities.
2. To provide for and support an annual review of DRG plans for future fiscal years by State Education Agency (SEA) representatives.
3. To organize, arrange, and provide staff support for a three day National Dissemination Conference.
4. To coordinate and carry out activities for a program of information exchange among SEA dissemination staff.
5. To provide administrative support for five regional and three topical SEA meetings.
6. To have National Conference participants assess and evaluate the utility of the National Dissemination Leadership Project.

*7. Technical assistance to states without Capacity Building and Special Purpose grants.

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*Added by the Director, NDLP.

## NDLP: Dissemination Representatives

Illinois: Carol Reisinger, Illinois Office of Education

Indiana: Paul Krohne, Director, Division of Public Relations, State Department of Public Instruction

Iowa: Mary Jo Bruett, Referral Specialist, Educational Media Center, State Department of Public Instruction

Kansas: Nancy L. Flott, Director, KEDDS Resource System, State Department of Education

Kentucky: Lynn Wood, Director, Division of Dissemination, State Department of Education

Michigan: Barbara Ort, State Department of Education

Minnesota: Gregory J. Waddick, Assistant Commissioner, State Department of Education

Missouri: Glenn White, Director, Research Coordinating Unit, State Department of Education

Nebraska: Royal Henline, Administrator, Curriculum Services, State Department of Education

Ohio: Roger J. Lulow, Director, Division of Planning and Evaluation, State Department of Education

Tennessee: Dee Wilder, State Department of Education

Wisconsin: Roy Tally, Supervisor, Information Retrieval Center, Department of Public Instruction

## ESEA Title I State Coordinators

Illinois: Mr. Robert H. Hardy, Jr., Director, Title I, ESEA

Indiana: Mr. William B. Strange, Director, Division of Compensatory Education

Iowa: Dr. Oliver T. Hinley, Chief of Title I, ESEA

Kansas: Mr. Kenneth Gentry, Director of Title I, ESEA

Kentucky: Mr. John Bruce, Director, Division of Compensatory Education

Michigan: Dr. Eugene T. Paslov, Director, Compensatory Education

Minnesota: Mr. Jack Hanson, Coordinator of Title I, ESEA

Missouri: Mr. A. E. Beach, Director, Title I, ESEA

Nebraska: Mr. Robert E. Dyke, Federal Projects Director

Ohio: Mr. Arlie E. Cox, Coordinator of Title I, ESEA

Tennessee: Dr. Willis Nowell, Director of Compensatory Education

Wisconsin: Mr. Frank N. Brown, Coordinator of Title I, ESEA

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## Title I Exemplary Projects

Illinois:

CONQUEST (also a PIP)
East St. Louis, Illinois

Child-Parent Centers Activity
Board of Education
Chicago, Illinois

Kansas:

Title I Corrective Reading
USD #259
Wichita, Kansas

Michigan:

Clarkston Schools Remedial Reading Program
Clarkston School District
Clarkston, Michigan

High Intensity Tutoring (HIT, also a PIP)
School Board of Highland Park
Highland Park, Michigan

Ohio:

Early Childhood Education--All Day Kindergarten
Cincinnati, Ohio

Diagnostic Reading Clinic
Cleveland, Ohio

PIP Diffusion contractors in the CEMREL/McREL service region include:

a. PIP Diffusion Service Center
Metropolis, Illinois

Project Director: Ms. Shirley Menendez

Service Area: Illinois, Iowa, Missouri, Indiana, Ohio, Western Kentucky

b. Special School District #1
Minneapolis, Minnesota

Project Director: Ms. Diane Lassman

Service Area: Colorado, Minnesota, North Dakota, Utah, Wyoming, Kansas, Nebraska, South Dakota, Wisconsin

Three Aesthetic Education Learning Centers (AELC's, CEMREL, Inc.) operate in the CEMREL/McREL service region: Normal, Illinois; St. Louis, Missouri; and Memphis, Tennessee. Working with the basic concepts of aesthetic education, the Centers meet the needs of both the arts specialist and the general classroom teacher. Local on-site coordinators organize programs to meet the needs of education students, experienced teachers back for a "short course," and kids. In the Centers, teachers work together with education students or teach demonstration classes. Working closely with cooperating schools, each AELC reaches classroom teachers to give them the needed confidence to handle aesthetic content with their students. They also reach school administrators and students within the region.

The Aesthetic Education Learning Centers are linked together through a network called the Aesthetic Education Group. The Group includes school personnel, teacher education agencies, arts organizations, various community service agencies, state departments of education, and others interested in working together to improve the teaching of aesthetic education in the nation's schools. The Centers are located in Centerport, Long Island; New York City; Harrisburg, Pennsylvania; Memphis, Tennessee; Normal, Illinois; Oklahoma City, Oklahoma; Jefferson County, Colorado; Oakland and Antioch, California; St. Louis, Missouri; and Washington, D.C.

The Bilingual Education Service Center, located in Arlington Heights, Illinois, provides supportive services to bilingual education programs in the Midwest. Staff consist of 30 bilingual professionals with varying areas of expertise. Thus, the center can provide services to a wide range of constituents.

The National Learning Disabilities Assistance Project (NaLDAP) is the technical assistance project funded by BEH to provide support services to the Child Service Demonstration Centers. NaLDAP is a project of The NETWORK, a non-profit educational service organization in Merrimac, Massachusetts. While providing for assistance in learning disabilities content areas, the

NaLDAP program also offers direct consultation to the CSDCs in program development, evaluation, management, information sharing, and the dissemination and diffusion of CSDC programs.

Like other NETWORK projects, NaLDAP is designed to build on the competencies of existing programs while identifying and responding to client needs.

The Minneapolis Public Schools/University of Minnesota Teacher Center: The EXCHANGE, located at the University of Minnesota College of Education (Minneapolis), has been engaged in education diffusion efforts for the past three years. At this time, programs serve local school districts (Minneapolis, St. Paul, and the seven county metropolitan area 11 counties in southeast Minnesota) and the University of Minnesota. The EXCHANGE operates three projects that serve a wide community of educators and parents. Programs of The EXCHANGE involve many R & D producers and users. Through the Central States PIPs Diffusion Project, state departments and local school districts in 9 states are involved with the agency. Funding sources include the Minneapolis Public school district, the University of Minnesota, (the Minnesota State Department of Education, the U.S. Office of Education, and the National Institute of Education.

A major purpose of The EXCHANGE is to link R&D outcomes to local school districts, state departments of education, and an institute of higher education--the University of Minnesota. In addition, all EXCHANGE programs emphasize the analysis and comparison of educational information, local needs assessment, cost-effective use of R&D resources and formative evaluation for school/district improvement.

## NIE School Practice and Service Grant Related Activities

NIE School Practice and Service Grant related activities ongoing in the CEMREL/McREL service region include the following:

a. Michigan Department of Education, Lansing, Michigan
Phillip Hawkins, Project Director
$1,060,603

The Michigan project will work through the Statewide system of Career Education Planning Districts to help local schools in 60 districts plan and implement career education programs.

b. National Education Association, Washington, D.C.
Robert Luke, Project Director
$915,939
(Massachusetts, Ohio, Michigan, Alabama, Pennsylvania, Wisconsin, Minnesota, Oklahoma, California, Washington, Wyoming, Texas)

NEA will work with 60 school districts in 12 states to help teachers choose R&D-based training materials that match their classroom needs and use them in inservice education programs. It will also operate a telephone system to disseminate practical research information in response to specific requests from classroom teachers.

c. The Network of Innovative Schools, Merrimac, Massachusetts
David Crandall, Project Director
$1,130,887
(Massachusetts, California, Kansas, Connecticut, Minnesota, Washington)

A consortium of organizations--universities, local school districts, non-profit corporations, State-recognized regional service units--will serve as Linking Agents in six states. They will provide technical assistance to school personnel and community leaders in identifying and installing the reading programs that best suit the needs of their students.

## Information Resources

The ERIC System provides the major centralized source of educational information in the CEMREL/McREL service region as well as across the nation. The ERIC System is made up of four components: sixteen ERIC Clearinghouses; Current Index to Journals in Education (CIJE); the ERIC Processing and Reference Facility which serves all components of the system; and Resources in Education (RIE). Many of the state and intermediate agencies and even some local agencies in the region have access to the ERIC System. At the state and intermediate level, most agencies are planning for accession capability.

ERIC Clearinghouses in the CEMREL/McREL service region include:

a. Career Education, Ohio State University

b. Counseling and Personnel Services, University of Michigan

c. Early Childhood Education, University of Illinois, Champaign-Urbana

d. Reading and Communication, Urbana, Illinois

e. Science, Mathematics and Environmental Education, Columbus, Ohio

## Major Teacher Training Institutions

Selected teacher training institutions in the CEMREL/McREL service region, in most cases, play a role in dissemination of information in education through formal and informal networks. For example, through the RIE contact person at Indiana University, we have identified a number of communication networks, some highly active and some largely inactive. These include:

a. The Dean's Network
(University Deans of Big Ten, Big Eight, and University of Chicago)

b. The Superintendent's Network

c. The President's network (University Presidents)

d. Mid-West Directors of Student Teaching Teacher Corps Consortium of Minnesota, Iowa, Indiana, and Kentucky (MINK Network)

## Descriptive Summary of Three Other Dissemination Activities

(The following descriptions were developed to highlight specific activities of three agencies not falling within the SEA, ISA, or LEA categories. They include a state facilitator project, a state education association, and a PIP diffusion contractor.)

## STATE FACILITATOR PROJECT

RX Contact Person

Director, Project MEDIA

A State Facilitator Project in the Regional Exchange service. region has been highly involved in the dissemination of information related to R&D outcomes/products. The project was funded by the U.S. Office of Education to:

a. Disseminate information about successful projects to local school districts in the state;

b. Assist local school districts in selecting programs that match their needs;

c. Assist local school districts in making adoption or adaption decisions regarding special programs;

d. Serve as a state-wide clearinghouse for information concerning the latest developments in education.

The project was staffed by professionals who specialized in a variety of subject matter areas such as learning disabilities, early childhood, and reading.

### Dissemination Activities

Dissemination activities engaged in by the project include:

a. development and distribution of awareness materials;

b. awareness presentations;

c. personal contacts with members of the educational community;

d. development of displays for educational conferences;

e. facilitation of adoptions of Developer/Demonstrator projects;

f. identification of prospective adopters of Developer/Demonstrator projects;

g. participation in National Diffusion Network activities.

Project MEDIA facilitated training of 1267 Illinois educators during the 1975-76 project year. The Developer/Demonstrator Projects for which educators were trained and the numbers trained in each were:

| | |
|---|---|
| Curriculum for Meeting Modern Problems | 396 |
| Success for SLD Child | 164 |
| Project HOPE | 155 |
| Project SEE | 131 |
| Talents Unlimited | 86 |
| Pegasus-Pace | 65 |
| Urban Arts | 60 |
| Project ICE | 46 |
| Media Now | 34 |
| Early Prevention of School Failure | 27 |
| Positive Attitude Toward Learning | 26 |
| Institute for Political and Legal Education | 23 |
| ECPC | 20 |
| Learning to Read by Reading | 10 |
| Saturday School | 8 |
| Project COMP | 6 |
| Parent Readiness Education Project | 6 |
| Project ACTIVE | 2 |
| Dallas Simu-School | 2 |

## STATE LEVEL EDUCATION ASSOCIATION

RX Contact Person

Director of Public Relations and Research, Kentucky Education Association

A State Level Education Association, a branch of the National Education Association (NEA), serves local members across the state through 12 field offices and a central office. The primary goal of the association is to strengthen local organizations. Association activities are supported primarily through membership dues. Convention exhibits and office rental provide supplementary income. Policy is made at two levels. NEA policy pertaining to the basic structure of the state organizations is adhered to. Policy in terms of programming is made at the state level by the delegate assembly.

The 12 field offices are staffed by 15 full-time professtionals. The central administrative office, staffed by 8 professionals, supports the field staff and works with the State Education Association Committee and with NEA.

### General Services Provided to Local Associations

In general, services provided are designed to strengthen local organizations and include: assisting with teacher negotiations; teacher rights; general problem solving; helping with special events; providing instructional information and aids to teachers; providing training to teachers; and, distributing an association newsletter.

### Dissemination Activities

The activities of the association are not specifically designed to disseminate R&D related outcomes/products. However, the association disseminates educational information to teachers through teacher-training programs and through an educational information library housed in one of the 12 field offices.

Training goals are established by a committee at the state level. The general training goal for the year is greater involvement for teachers in professional growth experiences. Examples of topics for training that may be covered within the next year include: leadership; communications; teacher rights; bargaining; and human relations. Training is generally conducted by field staff in the 12 association offices. Training strategies range from handouts to workshops and on-the-spot problem-solving assistance.

The central office houses an information library, including ERIC and some instructional materials, to which all association members have access. Information is disseminated when it is requested by individual teachers.

## Dissemination Issues

When asked about their perceptions of the saliency of R&D outcomes within their service region as well as current needs in improving dissemination strategies, association staff made the following general comments:

a. For the most part, information on R&D outcomes/products has not filtered down to the practitioner at all.

b. There is a need for greater availability and use of R&D outcomes/products. Teachers want and need information that is useful in the classroom.

c. Dissemination services should be centralized to a greater extent.

d. It is important that consumers have visual contact with R&D outcomes/products.

e. Dissemination activities should be handled through an agency that has direct contact with teachers.

## Exchange Planning and Operation

Agency staff responded favorably to the idea of a Regional Exchange. General comments and suggestions regarding exchange planning and operation include a favorable response to the following list of possible exchange activities.

a. Conducting traveling workshops pertaining to consumer information products.

b. Maintaining a library of materials for examination including product information materials and sample R&D materials.

c. Establishing a "hot line" for user groups in the region to request information and/or assistance in obtaining information about R&D products, consumer information, and resource personnel.

d. Collecting information on how consumer information products are used.

e. Collecting information on what consumer information products are needed by different user groups in the region.

f. Identifying exemplary programs as candidates for future development or field testing.

Further, it was suggested that the Regional Exchange implement and maintain a computerized information retrieval system.

# PIP DIFFUSION CONTRACTOR

RX Contact Person

Director of PIP Diffusion Center

A PIP Diffusion Contractor, one of eight contractors funded by the U.S. Office of Education to facilitate the diffusion of six Project Information Packages, serves a five and one-half state area within the RX service area. The agency is staffed by the equivalent of two full-time professionals.

## Dissemination Activities

Each of the six Project Information Packages is a self-contained set of materials providing detailed guidelines for implementing one of six model Title I reading/math programs. In addition to manuals for administrators, coordinators, or reading supervisors and reading teachers, each package contains materials designed to assist prospective adopters select from among the six projects (Analysis and Selection Kit) and orientation materials for use by a prospective adopter once a tentative decision has been made. The agency's first step in the diffusion process is to distribute the Analysis and Selection Kit to prospective adopting sites in the region. The diffusion strategy varies from state to state within the region.

Each Chief State School Officer in the region has appointed a "caretaker" for PIP's. The nature of the strategy depends to some extent on the role of the individual appointed as caretaker. For example, in one state, the caretaker is in charge of 16 media centers across the state. Agency staff work through the media centers to disseminate PIP materials. In another state, the caretaker is the state facilitator. In this case, PIP informational materials are disseminated to LEA's through the facilitator.

The caretaker in each state is provided with multiple copies of the Analysis and Selection Kits plus one full set of each PIP. In the context of their regular contacts with LEA's, the caretakers provide interested LEA's with the Analysis and Selection Kit and are placed in contact with diffusion agency staff. Agency staff provide orientation materials and informational assistance to prospective adopters who have made a tentative selective decision. When a firm selection decision is made by an LEA, a formal statement of intent to adopt is signed by the district, agency staff collect profile information on the district, and send the full package of materials to the site.

Agency staff provide assistance to an adopter site to the extent that they are at the readiness level. Assistance to a district during the actual implementation phase has not been possible to date, due to limits on staff time. In additional to initial indirect contacts with LEA's in the region, staff also respond to direct requests from LEA's.

The diffusion agency interacts primarily with the state departments, and local education agencies in the region. Some cooperative exchanges have been made through one major university, however.

## Dissemination Issues

When asked about their perceptions of the saliency of R&D outcomes within educational agencies in the service region as well as current needs in improving dissemination strategies, agency staff made the following general comments:

a. Selected individuals within the service region are generally aware of R&D outcomes, but this varies widely. One first step toward greater awareness and use would be to identify key individuals within the service region who are open to new ideas and who might be more receptive of information on R&D outcomes/products. A second step would then be to focus on getting others to at least an awareness level.

b. Dissemination strategies should focus and capitalize on the strengths of the National Diffusion Network strategies particularly the non-provincial aspects of the system which provides for the free flow of information across state boundaries.

c. The human contact factor is extremely important in informing individuals about R&D outcomes/products, and in improving dissemination.

## Exchange Planning and Operation

Agency staff responded favorably to the idea of a Regional Exchange General comments and suggestions regarding exchange planning and operation include:

a. Traveling workshops pertaining to consumer information products would provide a valuable service particularly if target audiences are carefully identified in advance and if all key groups in the geographical area have access to the workshop and/or information.

b. Centralizing product information materials and developing an informational "hot line" are productive ideas, particularly if a materials center could function as more than just a library but could provide information to users on how to get more information, who to contact in their states or districts, where to see the outcome/product in use, etc.

c. Collection of information on how consumer information products are used and what consumer information products are needed by different user groups in the region is important. A suggestion for how to identify key product users would be to work through the state facilitators in each state. The facilitators would be in a position to identify adopter districts and would have some first-hand information about product use.

d. Coordination of services and cooperation among the Regional Exchange and all other dissemination groups in the region is crucial.

# Appendix C

## Summary Report:

## Regional Exchange Planning Conference
## St. Louis, Missouri - December 14-15, 1976

## Overview

The first CEMREL/McREL Regional Information Exchange Planning Conference was held at CEMREL, Inc. in St. Louis on December 14th and 15th. Regional, state, intermediate and local education agencies and various other dissemination agencies across the twelve-state region were invited to participate in the planning meetings.

### Goals

- to acquaint members of the education community within the twelve-state region with the Information Exchange concept and related planning activities to date;
- to solicit reactions from educators within the region regarding the need for an Information Exchange;
- to solicit suggestions from educators within the region regarding the kinds of activities the Information Exchange might engage in on both a regional and state-by-state basis;
- to provide CEMREL staff with additional information regarding the nature and extent of dissemination activities ongoing within the region;
- to develop a plan for involving educators in the region in the continuation of Information Exchange planning efforts.

### Approach

- informal interactions;
- emphasis on small group work;
    1. groupings by agency (i.e., SEA, LEA, other disseminator agencies);
    2. mixed groupings each including SEAs, LEAs, other disseminator agencies, across the twelve-state region;
    3. within state groupings including agencies at all levels within a state.
- discussion of regional issues, concerns and suggestions.

# CEMREL/McREL REGIONAL INFORMATION PLANNING CONFERENCE

CEMREL, INC.
3120 59th Street, St. Louis, MO 63139
December 14-15, 1976
Agenda (Revised)

Day 1

| | |
|---|---|
| 8:00 | CEMREL staff pick up of participants at the Chase-Park Plaza |
| 8:30-10:30 | Coffee and Introductions<br>- "opening remarks" about CEMREL and McREL<br>- orientation to the DFS, and to the Information Exchange<br>- introduction of participants<br>preview the agenda for the 2 days |
| 10:30-10:45 | Break |
| 10:45-11:15 | Participants give brief oral report of their agency's dissemination activities |
| 11:15-12:00 | LEAs, SEAs, "Disseminators," HEW Regional Offices meet together to identify common concerns and needs for Exchange services. (LEAs meet together, SEAs together, etc.) |
| LUNCH | |
| 1:00-2:00 | All participants return to the large group to summarize concerns and needs expressed in the small groups. |
| 2:00-2:30 | List and preview some of the possible functions of the Information Exchange (large group discussion). |
| 2:30-4:30 | In groups of 4-7 persons each, critique the proposed functions and add others if desired. |
| 4:30 | Review of Day 1 and preview of Day 2 |
| 5:00 | Social hour |

## Day 2

| | |
|---|---|
| 8:30-9:00 | Coffee |
| 9:00-11:00 | Report and synthesize the results of the small group critiques of the Exchange functions (large group session) |
| 11:00-12:00 | Representatives from each agency (grouped by states) consider which of proposed functions (including ones they might suggest) their agency would like to see implemented by the Information Exchange. |
| LUNCH | |
| 1:00-2:00 | Report in large groups on the plans and priorities |
| 2:00-2:45 | Discuss the need for a representative advisory group for the Information Exchange ( perhaps select an ad hoc advisory group) |
| 2:45-3:00 | Discussion of follow-up meeting(s) and tie up loose ends of the agenda |

## Participants

Participants in the RIE planning conference included representatives of USOE Region VII, SEAs, LEAs, and dissemination agencies including ISAs, facilitator projects, other dissemination groups and a university teacher education program.

The following chart shows representation of education agencies across the twelve-state region. Lists of conference participants and participating CEMREL and McREL staff members are included as well.

| States | USOE | SEA | LEA | ISA/Dissemina |
|---|---|---|---|---|
| Illinois | | 1 | 1 | 2 |
| Indiana | | | 1 | 1 |
| Iowa | *1 | | | **(1) |
| Kansas | *(1) | 1 | | 1 |
| Kentucky | | | | 1 |
| Michigan | | 1 | 1 | 1 |
| Minnesota | | | | 2 |
| Missouri | *(1) | 2 | 5 | 3 |
| Nebraska | *(1) | 1 | 1 | *1 |
| Ohio | | | 1 | |
| Tennessee | | 1 | | 1 |
| Wisconsin | | 1 | | |
| TOTALS | 1 | 8 | 10 | 13 |

*Region VII includes Iowa, Kansas, Missouri, Nebraska.
**ISA/Disseminator representing both Iowa and Nebraska.

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## Issues and Concerns

Conference participants were asked during the morning of Day 1 to meet in small groups according to the type of education agency they represented--LEA representatives met as a group; representatives of ISAs and other dissemination agencies met in two groups; and, SEA representatives met as a group. They were asked to discuss general issues and concerns related to Information Exchange planning and operation. The major issues and concerns identified by each group are as follows:

### LEAs

1. Information should be matched with problems defined by LEAs.
2. There should be more emphasis on persons as information sources rather than retrieval systems.
    a. Who can I talk to?
    b. How can I talk to them?
    c. When is it (a particular program) used?
    d. How was it used?
    e. Have they had first-hand experience in adopting and/or adapting it?
    f. Do they express ownership to some degree?
3. There is a need for monitoring more released time for teachers and other LEA personnel. It is much easier if someone picks up the tab.
4. There is a need for resource persons to add more than one source of information when LEAs are presented with R & D options.
5. Idea Banks are one possible Information Exchange activity: issues and ideas as well as curricula. They may require different formats--curriculum systems may be more complicated.
6. Persons using ideas and/or products should be asked to report on them.
7. Policy statements should be phrased in realistic rather than idealistic terms.

ISAs/Disseminators (Group 1)

1. The timeliness, relevancy and comprehensiveness of the Information Exchange data base (data on dissemination activities ongoing in the region) is crucial in responsive planning.

2. Political implications such as territorial overlap are important concerns for both planning and operation.

3. There is a danger of getting too many dissemination "players" on an already crowded field.

4. What will the relationship between the Information Exchange and ERIC clearinghouses be? Professional organizations and their vehicles of dissemination?

5. What will be the cost to users of Information Exchange services? Free? Contractual?

6. What are the strengths of the institution in which the Information Exchange is housed? The nature of operational activities will depend upon this.

7. Information Exchange services should not duplicate those already provided by others.

8. Guidelines need to be developed to deal with territorial rights.

9. Information Exchange staff should develop alternative modes of delivery to account for variability within the region.

10. The Information Exchange might act as a "wholesaler" for disseminators in the region.

11. Centralization of resources, both information and human, is important.

12. Planning and coordination at the state level (for each state in the region) is required.

13. Quality control is crucial in terms of both information/products and human resources.

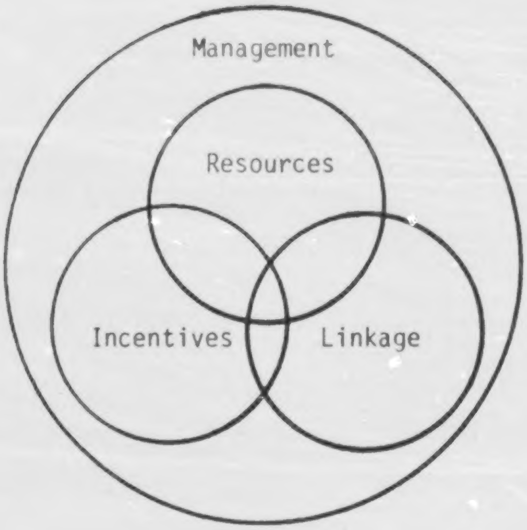
14. Development of a feedforward system should be an Information Exchange priority.

ISAs/Disseminators (Group 2)

1. The Information Exchange should provide a variety of services, in addition to supplying information to educators in the region.
2. Some possible activities include:
    - a. needs assessments
    - b. support services for dissemination/implementation
    - c. quality control (programs/products/practices)
    - d. putting research into practice
    - e. assisting with the packaging of promising practices
    - f. coordination of time frame restrictions
    - g. feedforward needs that are already evident
    - h. training of linkers and consumers
3. Turnaround time (request to delivery of information) is important.
4. The Information Exchange should avoid duplication of effort.
5. The Exchange should develop a capability to anticipate user needs.
6. Competitive systems should be avoided.
7. Every request should have an end product.
8. The Information Exchange should link with national resources.

SEAs

Information Exchange planning should be based upon a conceptual model such as the one proposed in the Interstate Project on Dissemination Report. The report emphasizes the need for a consistent statement of definition of what dissemination is.



## Critique of Proposed Functions

During the afternoon of Day 1, after discussing general issues and concerns, conference participants were asked to react to and critique a list of proposed Information Exchange activities developed by the RIE staff. The activities were grouped into five categories: dissemination of R & D information; feedforward activities; identification of regional resources; technical assistance; and, training. Participants were asked to meet in small heterogeneous groups wherein varying agencies and multiple states were represented. Each of the four groups approached the critiquing somewhat differently. One group chose to discuss general issues related to all five categories of activity as opposed to critiquing each individually. A second group focused on the list of activities and critiqued each. The remaining two groups focused only on two or three of the five categories of activity. The following summary outline presents the general points covered in all the groups.

A. General Issues Related to All Activities

1. The importance of taking (traveling R & D materials exhibit) information and materials to teachers. (Some difference of opinion about its utility and praticability).

2. The question of duplication of services depends on the definition of what is or is not an R & D outcome.

3. Should the Information Exchange also serve a lighthouse function --lead, not follow?

4. There is a need for more coordination among activities.

5. Should the Information Exchange actually do training, needs assessment, packaging, etc., or simply broker the services?

6. The Information Exchange must always respond in the same way.

7. View of the Information Exchange as a "turn key" operation; relatively short term relationships for specific activities.

8. There is a need for established guidelines.

9. Logistics of regional service difficult.

10. The Information Exchange should work through existing programs.

11. The Information Exchange might function as a switching center.

12. The Information Exchange might plan to be able to establish new programs.

13. Guidelines for the inclusion of materials are necessary.

14. The Information Exchange might provide an inventory of services for inclusion of materials.

15. Verification of services is an important activity.

16. The system should focus on what participant agencies can do together that each can't do separately.

B. Dissemination of R & D Information

   1. Work thorugh existing state dissemination units.

   2. Can't put services on wheels from the Information Exchange...but could use rental copies through dissemination units.

   3. One person in each state or dissemination unit representing the Information Exchange should help coordinate activities.

   4. Avoid canned programs--workshops should be brought in to satisfy specific purposes.

   5. Maintain up-to-date files--additions, deletions, modifications.

   6. Work through dissemination units to get multiple effects for delivery of materials.

7. Toll-free telephone is a good idea--might include a tele-copier. Should go to dissemination agents--then another link to LEAs.

8. The Information Exchange could provide coordination of the management system with feedback to the users and NIE.

9. Labs need other agencies to help disseminate. Labs are good at system management, documentation, evaluation, and research.

10. Replication sites can be identified for further validation.

11. A centralized library of information:

    a. might be a computerized system

    b. could include abstracts and/or microfiche

    c. should include readable synthesis/analysis documents

12. The Information Exchange should link into existing networks such as state facilitators, capacity building projects, teacher corps, deans network, and other ongoing networks.

13. The Information Exchange should utilize state department and LEA dissemination mechanisms; national computer terminals; public television; conferences.

14. A toll-free telephone service can serve several purposes:

    a. communication to the Information Exchange from clients

    b. requests to the field from Information Exchange staff

    c. data collection mechanism

C. Feedforward Activities

1. Feedforward activities should be an Information Exchange priortiy.

2. Information Exchange staff should identify personnel with needs assessment expertise.

3. Summarizing existing needs assessment data, assisting LEAs in doing their own needs assessments and conducting needs assessments on request were all considered appropriate Information Exchange activities.

4. The Information Exchange should be involved in facilitating the identification of promising practices.

5. The Information Exchange should collect user information about the use and usability of R & D outcomes to inform both educational decision makers and potential users.

D. Identification of Regional Resources

1. Include a JDRP as a means of screening products.

2. Emphasis on use of human resources.

3. Include SEA consultants along with LEAs.

E. Training

1. Utilize others as trainers where activities are currently being done by others.

2. Develop a trainer of trainers model--train a cadre of key trainers in the region.

3. Include names of trainers in newsletters and awareness materials.

4. Train trainers in skills and processes that will facilitate Exchange activities.

5. Different kinds and levels of training will be needed within each state in the Information Exchange region.

6. Focus on human contract.

7. Some specific training needs can be anticipated: decision making; resource development; grantsmanship; communications; team building; change strategies; conflict management.

8. Long term training goals might include: pre-service training for teachers; training local linkers.

9. The Information Exchange might engage in contractual agreements with educational agencies for some of the training, for example, facilitator projects.

10. Utilization of computerized systems and resources as a delivery system (i.e., Project Discovery; PLATO).

## Initial Planning By States

Following the critique of activities proposed by the Information Exchange staff, participants were asked to group themselves by state, and to begin discussing individual needs and proposed RIE activities to meet these needs. Representatives of Missouri met as one group; representatives of Michigan and Illinois met as a single group as they perceive themselves as having similar needs; likewise, representatives of Kansas, Iowa and Nebraska met as a group, as did representatives of Kentucky and Tennessee and representatives of Wisconsin, Minnesota, Indiana and Ohio. The general points discussed in each group follow.

### Missouri

1. The Information Exchange should function as a referral linker agency.
2. It should be a centralized depository of ideas, programs, information with the capability to synthesize information to meet specific needs.
3. The extension agent concept might be explored, with service centers located in various parts of the state.
4. Coordination of services is extremely important. The state department should be an integral part of coordinative efforts. One possible alternative might be to have Information Exchanges field staff housed with, or at least working with state supervisory staff.
5. The Information Exchange should work through professional organizations.
6. The services discussed seemed to fall into the five categories of activities proposed by Information Exchange staff.

### Illinois, Michigan

1. The priority of activity for the Information Exchange might be the development of a computerized data base including NDN programs, R & D products and outcomes, IVD programs, regional programs and others, which are currently available from varying sources but have never been pooled into one system.

2. Other activities in which the Information Exchange might engage include:
    a. the identification of strategies for getting teacher's and middle management's attention and increasing their awareness of what is available.
    b. developing topical workshops specific to the needs of schools of varying sizes.
    c. developing quality control criteria for products as well as for human resources.
    d. developing guidelines and formats for identifying promising practices and for helping teachers/developers put program information into a usable form.
    e. developing "catalogs" of materials and regional programs.

### Kansas, Iowa, Nebraska

1. The Information Exchange might conduct surveys of education service agencies in the region to determine the types of service requests to which the agencies are currently unable to respond.
2. The above survey would also be useful in identifying areas in which services are being duplicated.
3. The development of a human resource component including programs and expertise is important. The Information Exchange would serve to channel this information back and forth across the region.
4. Regional library networks should be explored and utilized.
5. Develop data reporting formats that are useful to educational agencies at all levels, in terms of what they want to know about themselves.

### Kentucky, Tennessee

1. The Information Exchange should work through existing authorities.
2. A traveling library would not be feasible. Materials could be housed within each state on a permanent or loan basis.
3. The Information Exchange should designate one person to work with each state in coordinating activities.
4. The Information Exchange should avoid canned programs--training should be geared to meet specific needs.

5. The Information Exchange data base should be maintained and updated frequently.

6. The Information Exchange should work through existing dissemination agencies to achieve a multiplier effect.

7. Telecopiers would be a useful addition to the toll-free telephone system. Copies might be placed in the Information Exchange as well as in the key agencies within each state.

8. The Information Exchange would provide coordination of management within the region and would feedforward information to users and NIE.

9. Educational labs need other agencies to help in disseminating R & D products/outcomes.

10. The Information Exchange should be involved in identifying replication sites.

11. A JDRP-like procedure should be used as a means of screening programs.

12. Information Exchange activities should take advantage of human resources whenever possible.

13. SEA consultants should be utilized by Information Exchange.

Wisconsin, Minnesota, Indiana, Ohio

Information Exchange planning should focus on coordinating regional activities through existing state authorities where they exist. Exchange activities should encourage the development of existing systems.

# Summary of Ideas

Some of the general implications for planning agreed upon by conference participants across all states and agencies are listed below.

1. Information Exchange planning should proceed from a comprehensive data base which reflects the nature and extent of dissemination activities ongoing within the region.

2. The Information Exchange should not duplicate services currently provided by education agencies within the region.

3. Information Exchange activities should be coordinated with state departments of/education, as well as with other education agencies involved in dissemination.

4. Services/information provided by the Exchange should be matched with the individualized needs of education agencies within the region. This implies the development of alternative delivery modes and systems.

5. Information Exchange planners should develop criteria for maintaining quality control for both information and human resources.

6. Emphasis should be on human resources as well as on information and information retrieval systems.

7. The development of a feedforward system should be a priority.

8. Turnaround time from request to the actual delivery of information/service must be relatively short if the Information Exchange is to be seen as a useful resource.

# Next Steps in Information Exchange Planning

Over the next two months, Information Exchange staff will be involved in the following planning activities:

- a follow-up planning conference scheduled for late January in Detroit, involving representatives of Michigan, Illinois, Minnesota, Wisconsin, Ohio, and Indiana.
- a follow-up planning conference scheduled for February in Kansas City, involving representatives of Kansas, Missouri, Iowa, Nebraska, Kentucky, and Tennessee.
- continued planning with NIE and other labs and centers having planning contracts.
- development of a proposal for the next phase of activities.

1/4/77 lmg

# Appendix

## Proposed Activities of the Regional Exchange

A Worksheet for Conference Participants
December 14-15, 1976

# PROPOSED ACTIVITIES OF THE REGIONAL INFORMATION EXCHANGE

Proposed functions or activities that the Regional Information Exchange may engage in are presented on the following pages. They are divided into the following categories:

- Dissemination of R & D Information
- Feedforward Activities
- Identification of Regional Resources
- Technical Assistance
- Training

These activities reflect our thinking at this time. We hope they will be useful in stimulating your thinking and planning.

## DISSEMINATION OF R & D INFORMATION

Activities falling within this category focus on the dissemination to users in the field of information about curricula, products, teaching and management methods and techniques that have gone through a process of development, field testing and evaluation.

| Type 1 Activities | | For What Purpose/For Whom |
|---|---|---|
| . R & D resources library (at the RIE or in branch locations such as in SEAs) or as a traveling library exhibit. | . Collect and make available for examination sampler materials from R & D developers, with emphasis on materials falling within priority areas.<br>Two types of materials<br>. Information about the products<br>. The actual products (instructional materials, training materials, research reports/findings | For teachers, school administrators, disseminators. Purpose is to make R & D materials and information about them readily accessible for direct examination and review by users. |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 2 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Conduct traveling topical workshops highlighting information about and materials for particular priority areas perhaps reading, mathematics, early childhood, school desegregation. | . Materials from resources library --identify workshop topics based upon needs/concerns identified through needs assessment (by RIE or by others) and on requests from educational agencies in the region. | For teachers, school administrators, disseminators. Purpose is to make R & D materials and information about them readily accessibl for direct examination and review by users. Topical and conducted by specialists |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 3 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Assist potential users of R & D outcomes in locating and working with the particular R & D developers that may have resources appropriate to the user's needs. | . Maintain an up-to-date file on the development activities and service resources of R & D developers. (Know the capabilities and special expertise of each.) | For education decision-makers who are responsible for locating and utilizing outside resources such as R & D developers. |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 4 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Disseminate awareness materials publicizing RIE services, noteworthy activities in SEA, LEA, etc. concerning special projects, upcoming events, etc. | . Newsletters, brochures, special mailings to selected audiences. | Various audiences:<br>LEA supts.<br>LEA instr./curr. supervisors<br>Disseminator agencies (state facilitators, bilingual education service center)<br>ISAs<br>SEAs<br>Other Information Exchanges<br>Labs and centers |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 5 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Provide a toll-free telephone service for information requests. | $ | For anyone wanting to request information or other services from the Exchange. Purpose is to permit immediate accessibility to the Exchange. |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

## FEEDFORWARD ACTIVITIES

Activities falling within this category focus on identifying concerns, needs, and product evaluation data from the field and channeling that information to developers and federal/state decision-makers.

| Type 1 Activities | | For What Purpose/For Whom |
|---|---|---|
| Identify needs/Concerns of educators in the region. Summarize and show areas of common and high priority needs. | Summarize statewide needs assessment data from several states in region in order to identify areas of common need across states. | Other SEAs, state and federal policy makers to inform decisions about new educational R & D. |
| | Assist LEAs in doing own needs assessment (and perhaps summarize across LEAs where possible. | LEAs that haven't done needs assessment recently to inform state and federal policy makers and to match up LEAs that appear to have common concerns and needs (so that LEAs that share common problems and communicate and share ideas, if they so choose. |
| | Conduct needs assessment, on request, for educational agencies. | |
| | Identify concerns based on high priority research areas in education (by universities, labs, or R & D centers). | |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 2 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Identify promising practices and products as candidates for future testing and perhaps, further development. | · Develop an active file of promising yet inidentified practices through our formal and informal communications/ineractions with educational agencies.<br>. Apply general screening such as not presently packaged, appears replicable, appears cost-effective, appears educationally worthwhile, i.e., addressed a high priority concern/need.<br>. Channel the information to the appropriate agency i.e., SEA Title IV programs, PIP developer (JERP). | . To inform developers (and funders of development) of possible future development and testing activities. |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

Type 3 Activities

- Collect user information about the use, usability of R & D products.
  - resources required for implementation, i.e., staff, materials/equipment, training;
  - (common) adaptations
  - implementation problems
  - user evaluation data
  - unanticipated outcomes positive as well as negative.

- Identify users of particular R & D products (high priority products) and collect information about their usability (and needed revisions).

For What Purpose/For Whom

- To inform developers and policy makers about needed revisions in materials, practices, or perhaps needs for implementation assistance. And to inform potential users about the usability of the materials (including needed revisions, technical assistance required).

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

## IDENTIFICATION OF REGIONAL RESOURCES

Activities falling within this category focus on identifying resources within the region, both information and human resources, that will be helpful in meeting the needs of educational agencies.

| Type 1 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Identify sources of information about R & D outcomes. | . Consumer Information Contractor | For Exchange staff and for Exchange users (on request). |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 2 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Identify sources of information about other educational products. | . Consumer Information Contractor | For Exchange staff and for Exchange users (on request |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 3 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Maintain an up-to-date file on agencies and persons within the region who can assist in selecting and using educational materials, products, methodologies, etc. | . Communicate regularly with educational agencies in the region in an attempt to determine their respective capabilities and specializations and their willingness to be included in a public "resource file." | For Exchange staff and for Exchange users (on request). Purpose is to make existing resources and expertise more readily accessible to potential users. |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 4 Activities |  | For What Purpose/For Whom |
|---|---|---|
| . Identify agencies that are using R & D outcomes and that are willing to respond (on request) to potential users questions about the product(s) /outcomes. | . Survey the developers LEAs and disseminators. | For potential users. Purp is to provide potential us with opportunities to talk with persons who have actu used the products in quest and to perhaps see the products in use. |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 5 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Identify quality "thin-market" materials (especially materials that match "high priority" needs. | . Survey the developers LEAs and disseminators. | LEAs and all disseminators. Purpose is to make existing resources more accessible. |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

## TECHNICAL ASSISTANCE

Activities falling within this category focus on providing short-term, as needed asstance to educational agencies in the region.

| Type 1 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Assist on request, educational agencies in establishing procedures for identifying exemplary programs/promising practices. | . Suggest alternative procedures and selection criteria other education agencies are using. | LEAs, ISAs, SEAs |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 2 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Assist education agencies in packaging education programs identified as worthy of replication. | . Suggest alternative packaging procedures used by other education agencies and assist user in implementing and/or adapting one or more of the procedures. The assistance might only consist of helping the user contact and get help from another agency most capable in applying the procedures selected by the user. | LEAs, ISAs, SEAs |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 3 Activiites | For What Purpose/For Whom | |
|---|---|---|
| . Assist LEAs in conducting their own needs assessment. | . Suggest alternative needs assessment procedures used by other educational agencies and assist in implementing and/or adapting one or more of the procedures. | LEAs, ISAs, SEAs |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

## TRAINING

Activities falling within this category focus on providing specialized training to educational agencies based upon priority needs and concerns identified in the region.

| Type 1 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Training program selection skills (how and where to find; how to compare and judge their relative merits; how to select from the alternatives) | . Traveling workshops | LEAs |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?

| Type 2 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Training in group decision-making skills | . traveling workshops | Anyone |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 3 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Training in how to implement the selected program or training for trainers (for implementing a particular program) | . Workshops | LEAs |

Comments: (Are the strategies and purposes clear? Do you feel that there need for this activity? What changes or additions do you feel would be useful?)

| Type 4 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Training in how to evaluate the program (to improve and/or reject) | . Traveling workshop | LEAs, ISAs, or SEAs |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 5 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Training in how to identify (validate) educationally worthwhile programs | . Traveling workshops | LEAs, ISAs, or SEAs |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 6 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Training in how to formulate a usable "search warrant" for locating information and/or services. | . Workshops | Linker Agencies |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

| Type 7 Activities | | For What Purpose/For Whom |
|---|---|---|
| . Training in using information sources. | . traveling workshops | any education agencies |

Comments: (Are the strategies and purposes clear? Do you feel that there is a need for this activity? What changes or additions do you feel would be useful?)

12/13/76 lmg

Appendix D

# SUMMARY REPORT:
# REGIONAL EXCHANGE PLANNING CONFERENCE

Detroit, Michigan-January 27-28, 1977

## Overview

The CEMREL/McREL Regional Exchange (RX) held a regional planning conference in Detroit, Michigan on January 27 and 28th. Representatives of six states in the RX region were invited to participate in initial state-by-state planning efforts. The states invited to participate were: Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin. The conference was hosted by the Michigan SEA. Facilities were provided by the Wayne County Intermediate School District.

### Goals

- to initiate individual state planning regarding the nature and extent of state involvement in RX activities;
- to initiate sharing of information regarding dissemination activities among states in the RX region;
- to provide RX staff with additional information regarding the nature and extent of dissemination activities ongoing within the region.

### Approach

- large group presentations;
- informal interactions;
- small group planning activities organized by state.

### Participants

Participants in the RX planning conference included representatives of SEAs, ISAs, LEAs, and other dissemination agencies including a university education program.

The following chart shows representation of education agencies across the six participant states. A list of conference participants is included as well.

| States | SEA | ISA | LEA | Other Disseminators |
|---|---|---|---|---|
| Illinois | - | - | - | - |
| Indiana | - | - | - | - |
| Michigan | 5 | 7 | 1 | 1 |
| Minnesota | 1 | - | - | 1 |
| Ohio | - | - | - | - |
| Wisconsin | 1 | - | 1 | - |
| Totals | 7 | 7 | 2 | 2 |

# Regional Planning Conference
# CEMREL/McREL Regional Exchange
# Agenda

Detroit, Michigan
January 27-28, 1977

## January 27

| | |
|---|---|
| 1:45-2:00 | Welcome and introductions |
| 2:00-3:40 | Dissemination reports by states (Minnesota, Wisconsin and Michigan)<br>Each report attempts to highlight key features of a state's dissemination agencies and activities, perhaps noting such activities as:<br>. State department's major dissemination activities,<br>. Capacity Building or special purpose dissemination grants,<br>. Identification and dissemination of "exemplary practices,"<br>. Participation in the National Dissemination Leadershio Project,<br>. NDN facilitator projects,<br>. ERIC or other information retrieval systems.<br>. Use of intermediate service agencies,<br>. Workshops, conferences, education fairs, etc.,<br>. Information packets, etc. |
| 3:40-4:15 | Overview of the Research and Development Exchange (RDX) and report on first planning conference |
| 4:15-6:15 | Discuss possible responses to user requests |
| 6:15-7:20 | Dinner |
| 7:20-9:00 | Overview of Information Exchange functions and orientation to state planning |

## January 28

| | |
|---|---|
| 8:30-12:00 | State planning, Minnesota, Wisconsin, Michigan, and Ohio (small groups) |
| 12:00-1:00 | Lunch |
| 1:00-1:45 | Each state summarized its planned involvement in the Information Exchange from March 1-November 30, 1977 |
| 1:45-2:00 | Wrap-up |
| 2:00-3:00 | Presentation by the Macomb Intermediate School District of their computerized communication system |

## PARTICIPANTS WHO ATTENDED CONFERENCE IN DETROIT, MICHIGAN

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## Initial Planning

RX staff presented the participants with draft outline of potential levels of involvement with the RX for the next nine-month planning phase. Participants were asked to form groupings according to state for the purpose of reacting to the potential activities of a general level and to begin initial state planning at a concrete specific level.

Two planning groups were formed--one including the representatives of both Minnesota and Wisconsin and one made up of the Michigan representative. Each group engaged in brainstroming activities regarding individual state needs and concerns as they relate to potential RX services. The planning format provided to participants follows.

# POTENTIAL INVOLVEMENT IN THE REGIONAL INFORMATION EXCHANGE
## FROM MARCH 1-NOVEMBER 30, 1977

FROM MARCH 1-NOVEMBER 30, 1977

## I. Continue Regional Planning and Preparation

### A. Inter-state Planning

1. The Information Exchange will sponsor and orchestrate three regional workshops for the purpose of continuing and extending feedforward and dissemination-oriented dialogue and cooperation within the Information Exchange region. Workshops will emphasize inter-state and inter-agency dialogue and cooperation. Participation will include SEA's, ISA's, LEA's, Regional Offices, universities, and other dissemination agencies.
2. The Information Exchange will establish a regional advisory panel composed of representatives of each state and will meet with the panel yearly.
3. The Information Exchange will disseminate a regional newsletter focused on RDX and regional planning.
4. The Information Exchange will summarize region-wide needs/priorities for new dissemination activities or relationships (e.g., the need to establish a materials resource center, perhaps) and for substantive areas (e.g., reading, metric ed, competency-based ed ?)
5. The Information Exchange will expand the data base that describes existing dissemination activities and plans (expand the Phase I survey) and assist CVE (Resource Referral Center) in building its data base including:
    - The identification of sources of information about R&D outcomes, human and material resources within the region useful in selecting/using R&D outcomes/materials.
    - The description of policies and procedures for identifying "exemplary practices" within the region and a listing of where further information about the practices can be obtained.

## II. Participate Directly in Selected Pilot/Start-Up Activities

### Activities the Exchange Prefers to Pilot During the 9-Month Period

1. Information Retrieval/Referral. Using the information base developed under Inter-state Planning #5 (and with the assistance of the other Research and Development Exchange Contractors) the Regional Information Exchange will respond to information requests from participating states. The response may take several forms, depending on the nature of the request and the particular situation of the requestor. If the Exchange can provide an adequate response from the resources at hand, it will do so. In some instances the Exchange may suggest other information sources and assist the requestor in accessing the appropriate sources. The Exchange may suggest information searches, such as ERIC, which the requestor can do on her own. If such resources are not easily available to the requestor, the Exchange may take the lead in the information search. A toll-free telephone will be established to facilitate user requests. The response service will become available in the fourth month of the contract.
2. Topical Workshops. The Information Exchange will identify a high priority user need through statements of need from education agencies in the region and through discussions with other RDX members. An initial statement of priority need will be made by month three of the contract though needs identification will be continued on a permanent basis as an important function of the Exchange. During the next three-month period, the Information Exchange will compile and synthesize, with other RDX contractors, materials which focus appropriate R&D outcomes and information resources on the selected user need. A workshop format will be developed for presenting the outcomes and information resources to users. In the next four-month period, Information Exchange staff will present and model the workshop for key linking agencies in the region (4-5 workshops). The materials and format will then be made available to other education agencies on a limited basis. The Information Exchange will solicit feedback following each presentation, to use in revising the workshop format and/or content.

### Other Activities That Might be Piloted if There is Sufficient Interest

1. Provide Exchange members with short-term assistance in identifying and resolving specific dissemination problems.
2. Assist SEA's in designing procedures for identifying, collecting, documenting, verifying, and retrieving information for their resource files.
3. Assist education agencies, on request, in establishing procedures for identifying exemplary programs and promising practices.
4. Assist in examining dissemination alternatives and models for decision making by SEA's and LEA's.
5. Assist RIE members in the evaluation of existing dissemination programs and activities.
6. Design and pilot test dissemination training for Exchange members. Such training may focus on the following skill areas:
    - program/product selection and evaluation
    - group decision making
    - implementation
    - change agent process skills
    - content or problem areas associated with R&D resource materials
    - validation techniques
    - searching and accessing techniques
    - utilization of information resources
7. Assist Exchange members in packaging thin market products.
8. Assist Exchange members in packaging promising practices generated within the region.

## . Continue Regional Planning and Preparation (Continued)

### . Intra-state Planning

1. The Information Exchange will work regularly (meet bimonthly?) with individual SEA's and other appropriate state agencies to further establish what should be the working relationships and to develop or extend the state's plan for working with the Information Exchange. Negotiate contracts, agreements or other formal relationships with state and other education agencies to implement work plans.

2. The Information Exchange will work with state representatives to identify substantive needs/priorities that the Exchange might attend to in its work with the state and in reporting to the RDX.

3. The Information Exchange will work with state education personnel to determine what kind of representation the state will have on the regional advisory panel and to establish a state panel to oversee the work of the Information Exchange within the state.

4. The Information Exchange will expand the data base that describes existing dissemination activities and plans (expand the Phase I survey) and assist CVE (Resource Referral Center) in building its data base including:
    - The identification of sources of information about R&D outcomes, human and material resources within the region useful in selecting/using R&D outcomes/materials.
    - The description of policies and procedures for identifying "exemplary practices" within the region and a listing of where further information about the practices can be obtained.

## Activities the Exchange Prefers to Pilot During the 9-Month Period (Continued)

3. Adapt Selected R&D Resource Materials to High Priority Regional Needs. The Exchange will (with the help of national RDX contractors) analyze the R&D resource base to identify R&D outcomes which address high priority regional needs (in the teaching of reading, for example). The Exchange will assist others in identifying and adapting resource materials (e.g., research syntheses, information packages, and resource catalogs) which are appropriate to users' needs. The Exchange will assist others in assessing the usefulness of such materials.

4. Topical Reviews. The Information Exchange and other RDX contractors will provide on a regular basis to state and regional education agencies, current information on the availability of new R&D outcomes, particularly focusing R&D outcomes and information as they apply to priority needs. During the first nine-month period, at least one and probably two topical reviews will be prepared and distributed to agencies participating in the RDX. Each topical review will include a regional insert, highlighting resources and information available within the region and focusing on specific regional needs. The regional insert will be prepared by the Information Exchange based upon regional information gathered and synthesized during inter- and intra-state planning. The RDX will solicit feedback from agencies receiving the reviews and regional inserts. The first review is planned for late spring.

## I. Continue Regional Planning and Preparation

## A. Inter-state Planning

1. The Information Exchange will sponsor and orchestrate three regional workshops for the purpose of continuing and extending feedforward and dissemination-oriented dialogue and cooperation within the Information Exchange region. Workshops will emphasize inter-state and inter-agency dialogue and cooperation. Participation will include SEA's, ISA's, LEA's, Regional Offices, universities, and other dissemination agencies.

( ) My agency would not participate in this activity during the 9-month period but might participate at a later date.

( ) My agency would not be likely to participate in this activity in the near future.

( ) My agency would like to participate in this activity during the 9-month period with the elaboration and changes noted in the following outline plan.

Insofar as possible at this time, outline how you think the activity could be worked out in your state considering such things as: timing; intended audiences; which agencies/individuals should have direct/indirect access to the activity; relationship of the activity to other programs or activities within the state; the relationship among the Information Exchange, the SEA, ISA's, LEA's and other disseminators; and, the degree of involvement for your agency.

2. **The Information Exchange will establish a regional advisory panel composed of representatives of each state and will meet with the panel yearly.**

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## Other Activities That Might be Piloted if There is Sufficient Interest

1. Provide Exchange members with short-term assistance in identifying and resolving specific dissemination problems.

2. Assist SEA's in designing procedures for identifying, collecting, documenting, verifying, and retrieving information for their resource files.

3. Assist education agencies, on request, in establishing procedures for identifying exemplary programs and promising practices.

4. Assist in examining dissemination alternatives and models for decision making by SEA's and LEA's.

5. Assist RIE members in the evaluation of existing dissemination programs and activities.

6. Design and pilot test dissemination training for Exchange members. Such training may focus on the following skill areas:

7. Assist Exchange members in packaging thin market products.

8. Assist Exchange members in packaging promising practices generated within the region.

## Next Steps in Regional Exchange Planning

The RX will meet individually with SEA representatives in the states of Iowa, Kansas, Kentucky, Missouri, Nebraska, and Tennessee to facilitate the development of state plans. As plans are developed, RX will include them in the proposal for the next nine-month planning phase, effective March 1, 1977. During this nine-month period, RX staff will meet individually with SEA representatives to further develop and refine state plans for the operational phase, effective December1, 1977. Further, the RX will pilot a number of activities furing the nine-month period to determine the feasibility of further development during the operational phase.

# Appendix E

# Sentence Outline for Operational Plan

# Introduction

The following section of the outline presents central elements of a plan for a Regional Information Exchange, to be operated by CEMREL and McREL within the organizational framework of the Dissemination and Feedforward System. The outline plan is an attempt by CEMREL and McREL to design a Regional Information Exchange that will be useful to education agencies within the specified service region while operating within the guidelines and goals of NIE and of the Dissemination and Feedforward System of which it is a member.

The plans are based on discussions and correspondence with key educators from each state within the region, preliminary fact-finding activities within the region, and interactions within the Dissemination and Feedforward System. CEMREL and McREL intend to continue such planning activities and consider the plans highlighted in the following outline as only a first step toward defining the scope and operational features of the Regional Information Exchange.

## III. Plans for Individual Components/Contractors (CEMREL/McREL Regional Information Exchange)

A. Objectives:

1. The Exchange will support overall system objectives, including the following:

    a. make high quality R & D outcomes more accessible to potential education consumers;

    b. improve the quality and availability of consumer information concerning R & D outcomes;

    c. improve educators' capabilities and inclination to make rational decisions in selecting and using R & D outcomes.

    d. make R & D efforts and outcomes more responsive to local and regional needs.

2. The CEMREL/McREL RIE views the following objectives as instrumental to the system objectives and appropriate for guiding the Exchange's work. (The objectives are further specified by the descriptions of proposed activities in Sections C1-C2.):

   a. disseminate information about R & D outcomes;

   b. identify consumer concerns and needs and channel that information to R & D developers and federal educational policy-makers;

   c. facilitate the identification and use of education resources available, yet not necessarily widely known, within the region.

   d. provide short-term technical assistance or help arrange for such assistance for education agencies in the region.

B. Target Audience

1. The Exchange will primarily serve and interact directly with agencies that assist LEAs in their efforts to improve instruction. In particular, the Exchange considers SEAs in such a key support role and, thus, will be a key agency to serve and collaborate within each state. Intermediate service agencies will also be a key audience, and, when they serve as an arm of an SEA the Exchange will discuss with the ISA and the SEA to determine the most appropriate and effective chain of interaction.

2. The Exchange will serve LEAs directly when requests from LEAs fall within the capabilities of the Exchange and cannot be met more effectively by some other agency.

3. The Exchange will also view the larger Dissemination and Feedforward System and NIE as appropriate audiences in the case of feedforward functions.

## Functions

### 1. Core Functions

a. Disseminate information about education R & D outcomes.

| | '77 | '78-'82 |
|---|---|---|
| 1. Maintain an R & D resources library (at the Information Exchange, in branch locations such as SEA offices, and/or as a traveling library exhibit). Collect and make available for examination, sampler materials from R & D developers, with emphasis on materials falling within priority areas. Two types of materials would be included: information about products and the actual products, i.e., instructional materials, training materials, research reports/findings. | Begin the development of a resources library, housed within the Information Exchange, and make available to education agencies on a limited basis. | Expand the resources library and develop branch libraries within the region. |
| 2. Arrange for traveling topical workshops highlighting information about and materials for particular priority areas, perhaps reading, mathematics, early childhood, school desegregation.<br>Use materials from resources library. Identify workshop topics based upon needs/concerns identified through needs assessemnt (by Information Exchange or by others) and on requests from educational agencies in the region. | Develop and pilot on a limited basis, the traveling workshop concept. | Expand the traveling workshop concept to include regionally identified priority areas. |
| 3. Assist potential users of R & D outcomes in locating and working with the particular R & D developers that may have resources appropriate to the user's needs.<br>Working with Information/Resource Referral Contractor, maintain an up-to-date file on the development activities and service resources of R & D developers. (Know the capabilities and special expertise of each.) | Develop specifications for a file on the activities and resources of R & D developers. | Assist IRR Contractors in establishing, maintaining and updating the file of activities and resources. |

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| 4. Disseminate awareness materials publicizing Information Exchange services, noteworthy activities in SEA, LEA, etc. concerning special projects, upcoming events, etc.<br>(Newsletters, brochures, special mailings to selected audiences.) | Disseminate a newsletter publicizing Information Exchange activities. | Disseminate additional awareness materials to both general and selected audiences. |
| b. Identify consumer concerns and needs and channel the information to R & D developers and federal educational policy-makers. | | |
| 1. Identify needs/concerns of educators in the region. Summarize and show areas of common and high priority needs.<br>Possible activities include: summarizing state-wide needs assessment data from several states in region in order to identify areas of common need across states; assisting LEAs in doing own needs assessment (and perhaps summarize across LEAs where possible), conducting needs assessment, on requests, for educational agencies; identifying concerns based on high priority research areas in education (by universities, labs, or R & D centers). | Summarize state-wide needs assessment data from the region. Identify areas of common need across states. | Maintain information on needs assessment data, assist education agencies in conducting needs assessment and conduct needs assessment on request. |
| 2. Identify promising practices and products as candidates for future testing and perhaps, further development: developing an active file of promising yet unidentified practices through our formal and informal communications/interactions with educational agencies; applying general screening such as not presently packaged, appears replicable, appears cost-effective, appears educationally worthwhile, i.e., addressed a high priority concern/need; channeling the information to the appropriate agency i.e., SEA Title IV programs, PIP developer (JERP). | | Develop and maintain a procedure for identifying promising practices and products. |

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| 3. Collect user information about the use, usability of R & D projects. (Resources required for implementation, i.e., staff, materials/equipment, training; [common] adaptations; implementation problems; user evaluation data; unanticipated outcomes positive as well as negative.) Identify users of particular R & D products (high priority products) and collect information about their usability (and needed revisions.) | | Develop and maintain a procedure for collecting user information. |
| c. Identification of regional resources. | | |
| 1. Identify sources of information about R & D outcomes, primarily through the Consumer Information Contractor or through the Information/Resource Referral Contractor (IRRC). | Develop a file of sources of information about R & D outcomes. | Maintain/update the file. |
| 2. Identify sources of information about other educational products, primarily through the Consumer Information Contractor through the Information/Resource Referral Contractor. | Develop a file of sources of other educational products. | Maintain/update the file. |
| 3. Maintain an up-to-date file on agencies and persons within the region who can assist in selecting and using educational materials, products, methodologies, etc.<br>Communicate regularly with educational agencies in the region in an attempt to learn more about their respective capabilities and specializations. | Develop a file of resources (agencies and persons) within the region. Sponsor a series of planning and reciprocal training workshops for the purpose of increasing key service/linker agencies' knowledge about each other (including the Exchange) and for facilitating collaboration and cooperation. | Maintain/update the file. |
| 4. Identify agencies in or near the region that are using R & D outcomes and that are willing to respond (on request) to potential users questions about the product(s)/outcomes. | | Implement |

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| Survey the developers, LEAs and disseminators. | | |
| 5. Identify quality "thin-market" materials (especially materials that match "high priority" needs).<br>Survey the developers LEAs and disseminators. | | Implement |
| 2. Optional Functions<br>a. Short-term technical assistance<br>1. Assist on request, educational agencies in establishing procedures for identifying exemplary programs/promising practices.<br>Suggest alternative procedures and selection criteria other education agencies are using. | | Implement on limited basis |
| 2. Assist education agencies in packaging education programs identified as worthy of replication.<br>Suggest alternative packaging procedures used by other education agencies and assist user in implementing and/or adapting one or more of the procedures. The assistance might only consist of helping the user contact and get help from another agency most capable in applying the procedures selected by the user. | | Implement on limited basis. |
| 3. Assist LEAs in conducting their own needs assessment. | Assist LEAs in conducting their own needs assessment if requested to do so. | Continue |

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| Suggest alternative needs assessment procedures used by other educational agencies and assist in implementing and/or adapting one or more of the procedures. |  |  |
| b. Specialized training to education agencies. |  |  |
| 1. Training program selection skills (how and where to find; how to compare and judge their relative merits; how to select from the alternatives). |  | Begin training program with assistance from national contractors. |
| 2. Training in group decision-making skills. |  | Begin training. |
| 3. Training in how to implement the selected program or training for trainers (for implementing a particular program). | Training on a pilot basis in high-priority areas. | Expand training. |
| 4. Training in how to evaluate the program (to improve and/or reject). |  | Begin training. |
| 5. Training in how to identify (validate) educationally worthwhile programs. |  | Begin training. |
| 6. Training in how to formulate a usable "search warrant" for locating information and/or services. | Plan with Consumer Information Contractor or IRRC. | Begin training. |
| 7. Training in using information sources. | Plan with Consumer Information Contractor or IRRC. | Begin training. |

3. Relationships with other System Components

   a. The Exchange will operate in accordance with the general policies and directives agreed upon by NIE and the DFS decision-making body.

   b. With other Exchanges: CEMREL/McREL will regularly communicate with other Exchanges for the purpose of sharing ideas and concerns concerning the service component of the system.

   c. With the System Coordinator and Data Management Contractor (operations component) CEMREL/McREL will:

      1. cooperate in internal system evaluation activities;

      2. inform the operations component about high priority needs that are identified during regional needs assessment activities and other Exchange activities and provide a list of regional "candidates" for exemplary practice to be channeled to appropriate review panels.

      3. participate regionally in system approved data collection activities, pilot data collection instruments and procedures and critically examine and react to such instruments and procedures.

      4. cooperate in system public relations.

      5. utilize the operations component's data management expertise by requesting advice and technical assistance as needed in matters pertaining to data collection and management done by the Exchange.

      6. request selected data syntheses done by operations component, when such syntheses have direct implications for Exchange operation.

   d. With the Information/Resource Referral Contractor CEMREL/McREL will:

      1. assist IRRC in compiling and maintaining an inventory of information service agencies and agents existing in the Exchange region.

      2. assist IRRC in documenting and evaluating the usage and usefulness of IRRC services within the Exchange region.

      3. assist IRRC in periodically surveying regional user requests for information, especially pertaining to information resources and help IRRC determine the

services to help the Exchange respond to user information requests.

4. Expect the IRRC to refer user requests to the Exchange rather than routinely dealing directly with users.

e. With the Consumer Information Center CEMREL/McREL will:

1. Inform the CIC about high priority needs for knowledge syntheses and transformations identified within the Exchange region.
2. Assist CIC in planning documents, seminars, etc. that meet the priority area identified by the Exchange.
3. Assist the CIC in piloting and evaluating information models developed.
4. Cooperate with CIC in evaluating the NIE catalogs.
5. Request particular knowledge syntheses to meet information needs specific to the CEMREL/McREL Exchange.
6. Disseminate appropriate knowledge syntheses and topical reviews.

f. With the Linkage Agent Training Project CEMREL/McREL will:

1. inform the Training Contractor of high priority areas that lack adequate training components, especially pertaining to generic training and linkage skills.
2. request advice and technical assistance as needed, from the Training Contractor pertaining to training activities of the Exchange.
3. Cooperate with the Training Contractor in evaluating training models and packages.

D. Operations

1. Internal Operations

   a. The joint CEMREL/McREL Regional Information Exchange Project is grouped with other CEMREL/McREL projects involved in dissemination activities. The Regional Information Exchange will operate directly with McREL through a subcontract.

   b. The Regional Information Exchange Project will have access to all of the facilities and support services within the two laboratories such as business and personnel services, film, sound, graphics and design services, data processing, production, and reproduction.

   c. The project will be staffed by a director, information resource staff, research staff, field services staff and clerical staff.

      1. The project director will be responsible for overall project management and supervision of project staff.

      2. Information resource staff will be primarily responsible for developing and maintaining a file of information on R & D outcomes as well as a file on information and human resources in the region.

      3. Research staff will be primarily responsible for analyzing and synthesizing needs assessment information, developing formats for collecting user information, and analyzing and synthesizing data collected from users.

      4. Field services staff will be primarily responsible for the technical assistance and training aspects of the project. Further, they will serve as the primary contacts and dissemination agents through which requests to the Exchange will be received and processed.

   d. The project will use specialists, on a consultant basis, to supplement the expertise of project staff. Consultants will be used most heavily in the training component.

2. External Operations

   a. Cooperative Planning

      1. The Regional Information Exchange Project will continue to be involved in cooperative planning with all interested education agencies in the twelve-state region. Representatives of OE regional offices, state departments of education, intermediate service agencies, local education agencies, other dissemination agencies, colleges of education and professional organizations will be requested to participate in project planning conferences and will be asked to react to written planning documents.

b. Regional Governance

1. The regional governance structure of the Exchange will be defined more precisely at a later date. However it is possible to specify some operational principles and to suggest a few governance procedures.
    a. CEMREL/McREL will establish governance and advisory board, comprised of representatives of key Exchange audiences within the region including HEW Regional Offices, SEAs, ISAs, LEAs, and teacher training institutions.
    b. Each state must be represented by at least 1 of the above agencies.
    c. CEMREL/McREL will be represented on the board by a member of the Exchange staff.
    d. The board will be encouraged to select its own leadership, and, in consultation with the Exchange staff, manage its own deliberations and recommendations.

c. Operational Principles

1. The Regional Information Exchange will plan for and develop activities that are consistent with the following operational principles.
    a. Project activities will not conflict with existing state-wide dissemination activities/strategies.
    b. The project will work through key existing dissemination agencies within each state.
    c. The Information Exchange will respond to direct requests from local education agencies only if their information/service needs cannot be met by existing agencies within a state.
    d. The data base upon which Exchange activities are planned will be updated and maintained throughout the duration of the project.